**SWITCH Library Consortium**
**Milwaukee, Wisconsin**

# Millennium
# Course Reserves Manual
(#105292)

To access the Course Reserves mode, you must be authorized for functions 48 ("Course reserves") and 171 ("View course records"). To edit course records, you must be authorized for function 174 ("Update course records").

The Course Reserves mode will not be available (grayed out) if there are no course records in your database.

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# Millennium Reserves – CREATING RESERVE RECORDS

#100280 and #100270

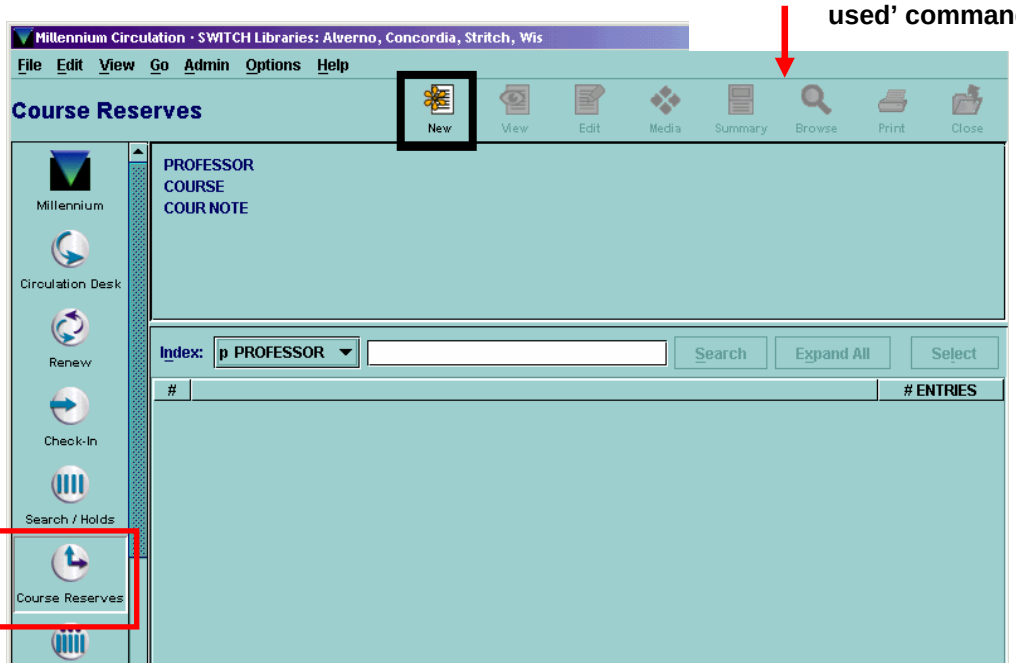
## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password.

## **Millennium Circulation** will then come up:

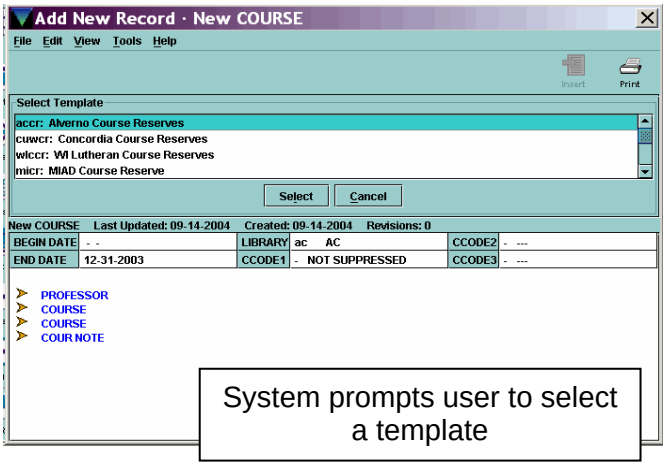
**TOOLBAR features 'commonly-used' commands.**

**MAIN MENU**

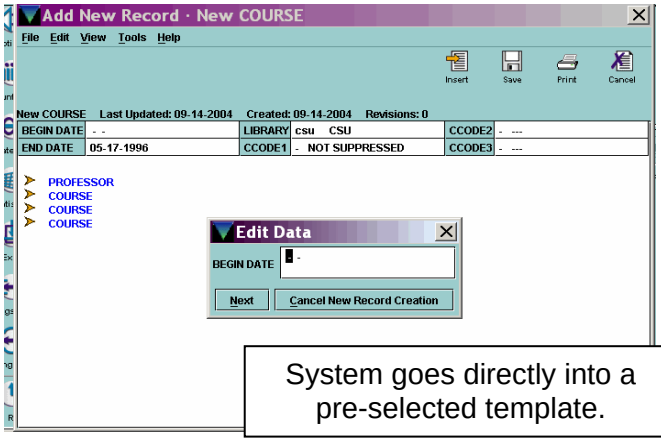



**NAVIGATION BAR**

1. Make sure you are in the **COURSE RESERVES** mode.
2. Search for an existing reserves record in TOPCAT (by p for professor's name or r for course name).
3. If you locate a record, highlight the record and begin attaching items to it. If there is NO course reserve record:
   a) Click on the **NEW** button from the toolbar and create a new course reserves record.
   b) Depending on the settings for YOUR login (**Admin | Settings**), the system will either prompt you to select a reserves record template (from which you will create a new reserves record), or the system will bring up a pre-selected reserves template (within which you will fill in information in the appropriate fields).




System prompts user to select a template



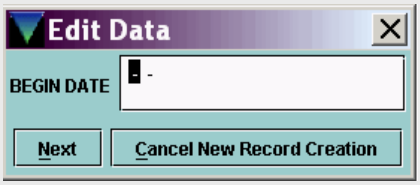

System goes directly into a pre-selected template.

**CONTROLLING TEMPLATES**

To pre-select a specific reserves record template, go to **Admin | Settings | New Records tab | New Records Templates**. To create a new template or edit an existing template, go to **Admin | Settings | Templates**. For more information, see **Managing Templates for New Records**, # 105825 of the Innovative user manual, or ask the SWITCH office.

**OPTIONAL WIZARD TO CREATE NEW RECORDS**

Each login ***can*** be set to use a WIZARD to create new records. A wizard is a *series of dialog boxes that display as you fill in information to create a new record*. In other words, for each field of a given record template, the system will prompt you with a dialog box to fill in the data needed. For example,




You then choose **Next** to go to the next dialog box representing the next field. At the end, you save. Contact the SWITCH office if you'd like to change this setting to not use a wizard. In that case, you will be presented with the new record template to edit the fields. No dialog boxes will display. This is set on a login by login basis.

4. Be sure to fill in the necessary field information for a reserve record, likely:
   - **BEGIN DATE**
   - **END DATE**
   - **LIB (your library code)**
   - **PROFESSOR (Last name, First name)**
   - **COURSE RESERVE NAME (you can put in more than one name to help students find the course)**
   - **NOTE or another field**

   Keep in mind if you are using a wizard and want to ADD VARIABLE FIELDS to a new record, you need to wait until all dialog boxes finished displaying and Save the record. Then choose the **Insert** button on the toolbar to choose and insert the variable field you want to add.

5. Save the record using Ctrl+S or the **Save** button on the toolbar. Click on the **Summary** button to go back to the previous screen.

6. Once the reserve record has been created you may **attach items** to the record. Follow the appropriate set of instructions (see SWITCH Reserves web page) depending on if you are attaching an item from your library's collection (Attaching Items From Your Collection), OR if you're attaching a bib & item for any personal copies; photocopied items; or for electronic items, typically in the form of PDF's (Attaching Bib & Items to a Reserve Record).

# Millennium Reserves – EDITING AND DELETING A RESERVE RECORD

#105541 and #105543

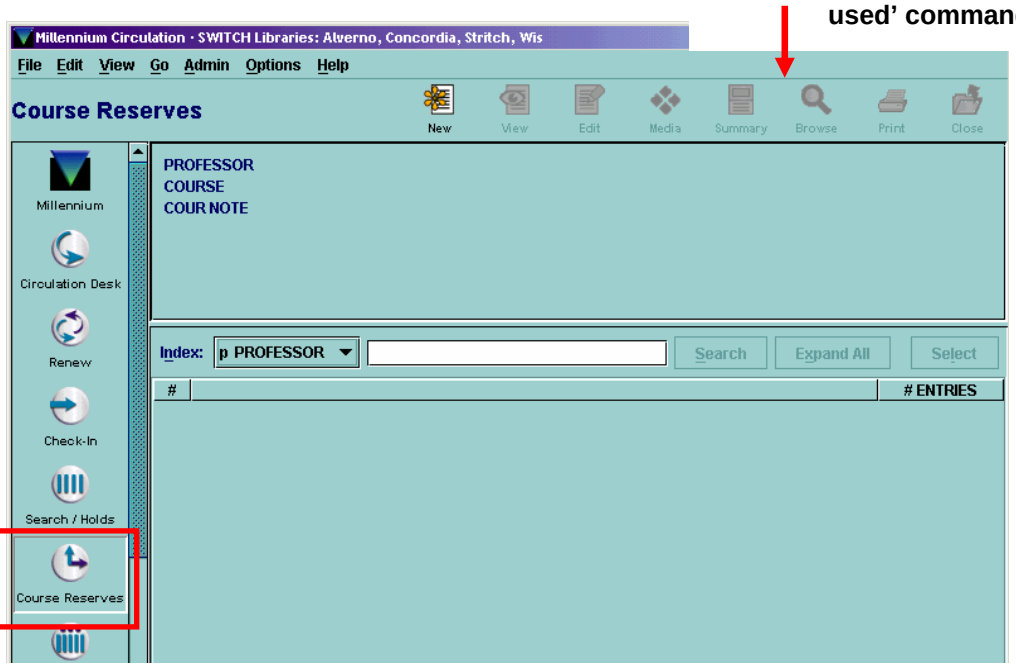
## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password.

## **Millennium Circulation** will then come up:

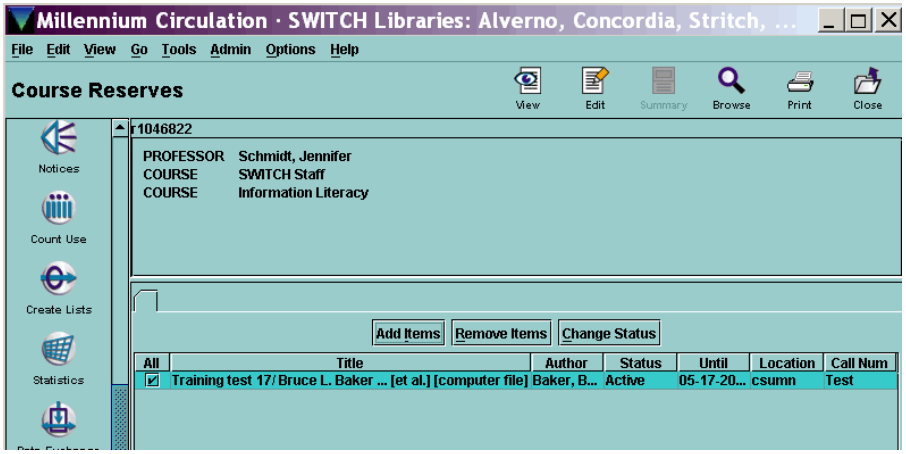
**TOOLBAR features 'commonly-used' commands.**

**MAIN MENU**



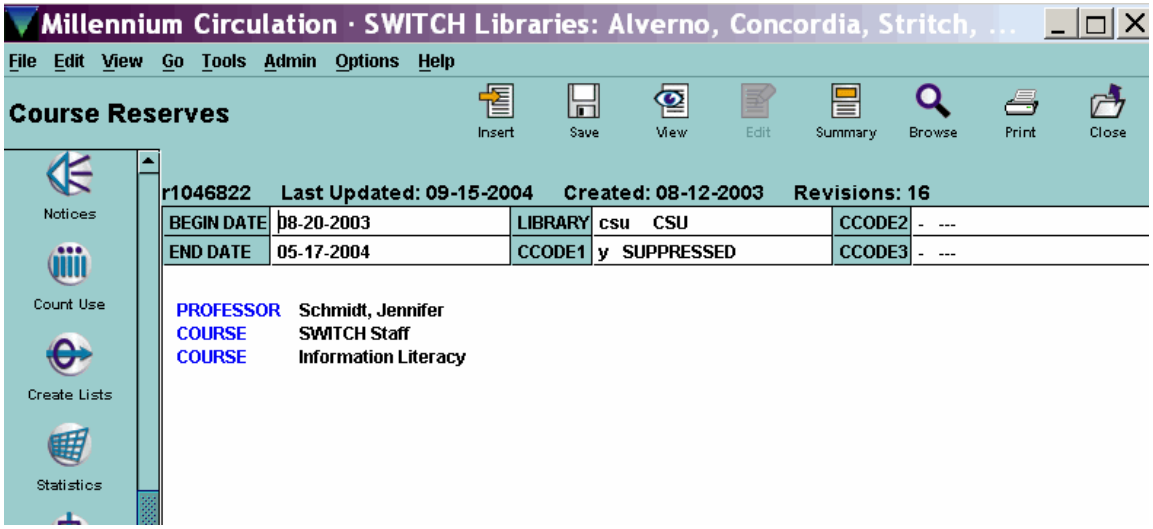

**NAVIGATION BAR**

1. Make sure you are in the **COURSE RESERVES** mode.
2. Search for an existing reserves record in TOPCAT (by p for professor's name or r for course name).
3. Highlight & select the correct reserve record to bring it up. It will then display at the top of the Millennium main window.


Millennium Circulation · SWITCH Libraries: Alverno, Concordia, Stritch, ...
File Edit View Go Tools Admin Options Help
Course Reserves
View Edit Summary Browse Print Close
Notices
Count Use
Create Lists
Statistics
r1046822
PROFESSOR Schmidt, Jennifer
COURSE SWITCH Staff
COURSE Information Literacy
Add Items Remove Items Change Status
All Title Author Status Until Location Call Num
Training test 17/ Bruce L. Baker ... [et al.] [computer file] Baker, B... Active 05-17-20... csumn Test

## TO EDIT A RESERVE RECORD

4. Click the Edit button on the toolbar to go into the Edit mode of the reserve record.


Millennium Circulation · SWITCH Libraries: Alverno, Concordia, Stritch, ...
File Edit View Go Tools Admin Options Help
Course Reserves
Insert Save View Edit Summary Browse Print Close
Notices
Count Use
Create Lists
Statistics
r1046822 Last Updated: 09-15-2004 Created: 08-12-2003 Revisions: 16
BEGIN DATE 08-20-2003 LIBRARY csu CSU CCODE2 - ---
END DATE 05-17-2004 CCODE1 y SUPPRESSED CCODE3 - ---
PROFESSOR Schmidt, Jennifer
COURSE SWITCH Staff
COURSE Information Literacy

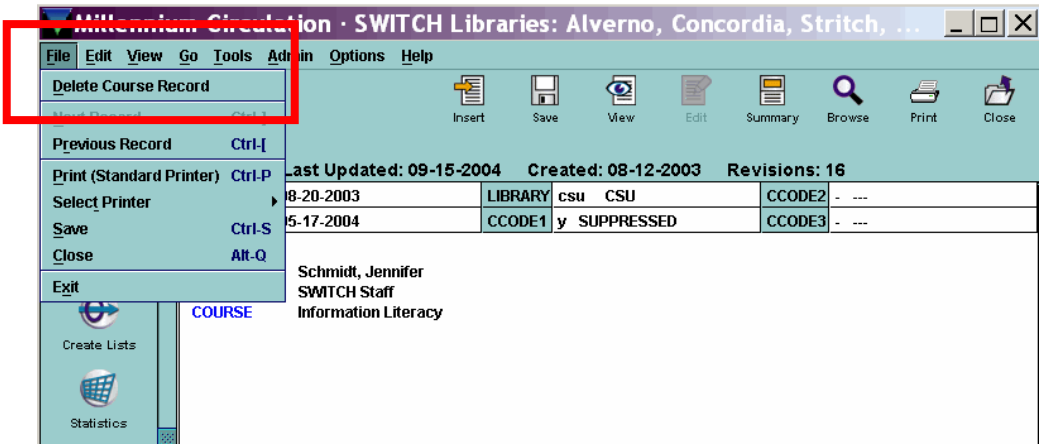
5. Edit any fixed or variable fields as needed. Then save using the **Save** button or Ctrl+S.

6. Close the record using the **Close** button on the toolbar.

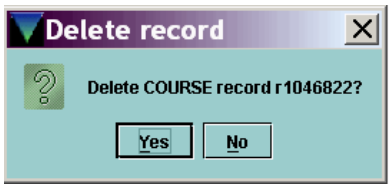
## TO DELETE A RESERVE RECORD

4. Click the Edit button on the toolbar to go into the Edit mode of the reserve record.

5. Choose **File | Delete Course Record** on the main menu.




6. The system will prompt you to delete the course record. It will let you know if you still have items attached to the reserve record. There cannot be any items attached to a reserve record when you want to delete the record.




7. After deleting the record, the system will take you back to the search screen for the **Reserves** mode.

# Millennium Reserves – TAKING ITEMS OFF OF RESERVE

#100258

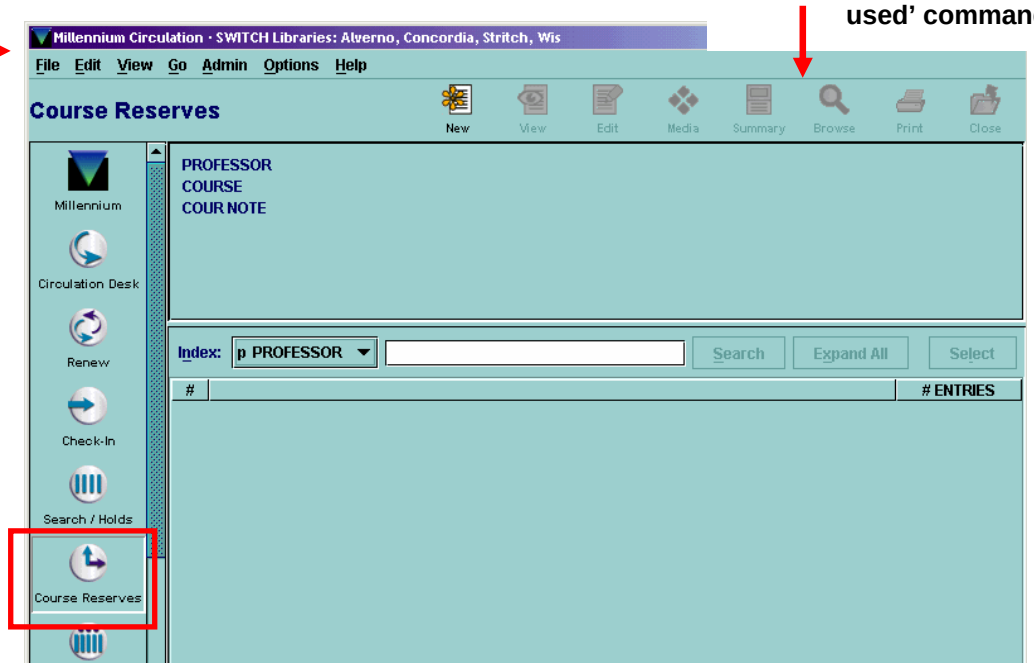
## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password.

## **Millennium Circulation** will then come up:

**TOOLBAR features 'commonly-used' commands.**

**MAIN MENU**




**NAVIGATION BAR**

1. Go to the **COURSE RESERVES** mode.
2. Search for an existing reserves record in TOPCAT (by p for professor's name or r for course name).
3. Highlight & select the correct reserve record. (It will then display at the top of the Millennium main window).

## TO REMOVE OR TAKE ITEMS OFF OF A RESERVE RECORD

4. Highlight the item or items you want to take off reserve. Then choose the **Remove Items** button.

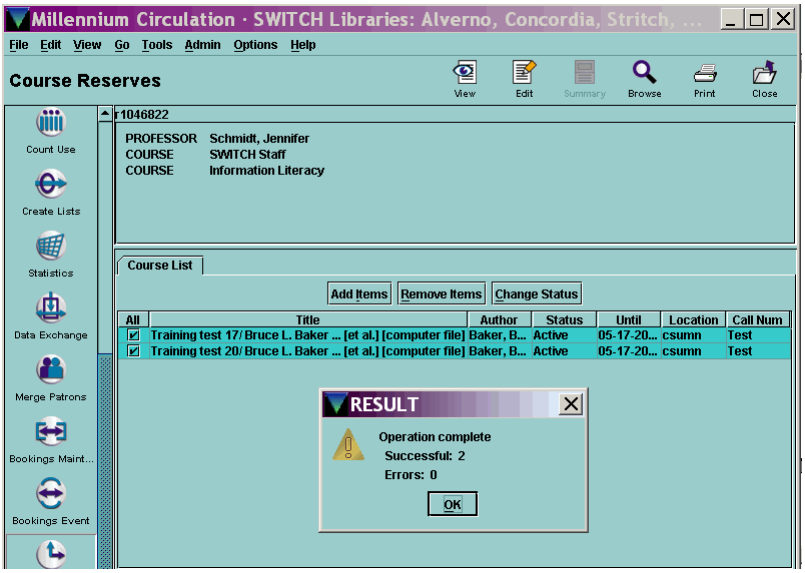
**WAYS TO SELECT MULTIPLE ITEMS IN A LIST:**

a. Checkmark the small check boxes to the left of each item you need.

b. To highlight several items sequentially next to each other in a list, highlight the first item you need, then go to the last item you need, hold down the SHIFT key and select the last item (while the first is still selected). It will select all the items in between along with the first and last items.

or

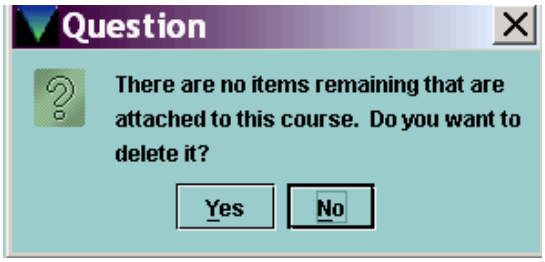
c. To highlight several items NOT sequentially next to each other in a list, highlight the first item you need, then hold down the CTRL key as you select the other items in the list you need.


Millennium Circulation · SWITCH Libraries: Alverno, Concordia, Stritch, ...
File Edit View Go Tools Admin Options Help
Course Reserves
View Edit Summary Browse Print Close
Count Use
Create Lists
Statistics
Data Exchange
Merge Patrons
Bookings Maint...
Bookings Event
r1046822
PROFESSOR Schmidt, Jennifer
COURSE SWITCH Staff
COURSE Information Literacy
Course List
Add Items Remove Items Change Status
All Title Author Status Until Location Call Num
Training test 17/ Bruce L. Baker ... [et al.] [computer file] Baker, B... Active 05-17-20... csumn Test
Training test 20/ Bruce L. Baker ... [et al.] [computer file] Baker, B... Active 05-17-20... csumn Test
RESULT
Operation complete
Successful: 2
Errors: 0
OK

5. The system should then display a small confirmation dialog box. (see above). It will indicate the number of errors vs. successes. The item or items are now removed from the reserve record.

> **IMPORTANT: Whenever you remove an item from reserve, Mil Circ automatically uses the data in the SAVE ITEM field to restore the values of the LOC, ITYPE and TOT CHKOUT fields. It also adds a RESERVE NOTE to the record indicating the date the item was placed ON or OFF reserves and for what course.**

6. If you remove all of the items attached to a given reserve record, the system will ask you if you want to DELETE the course reserve record. The message will look like this:




7. Choose the **Close** button on the toolbar to return back to the main Course Reserves mode display.

> **IMPORTANT: If you need to actually DELETE the BIB & ITEM for a particular work.**
>
> 1. **Go to the Search/Holds mode of Millennium Circulation and search for the given item** (by title or barcode.).
> 2. **Bring up the correct item** (make sure it's from your library). **If there are other ITEMS from other libraries, do not delete the bib as it is in use. Delete the ITEM ONLY:**
>    a. **Go into the ITEM record TAB for the correct item record.**
>    b. **Choose File | Delete Item record from the main menu.**
>
> 3. **If you can safely delete the bib (and the item):**
>    a. **Choose the Edit button on the toolbar to go into the Edit mode of the BIB record.**
>    b. **Choose File | Delete Bibliographic record from the main menu**
>    c. **The system will ask if you want to delete any attached items. You may do so, so long as the items attached belong only to your library.**

# Millennium Reserves – LISTING RECORDS WHOSE STATUS SHOULD CHANGE #100260

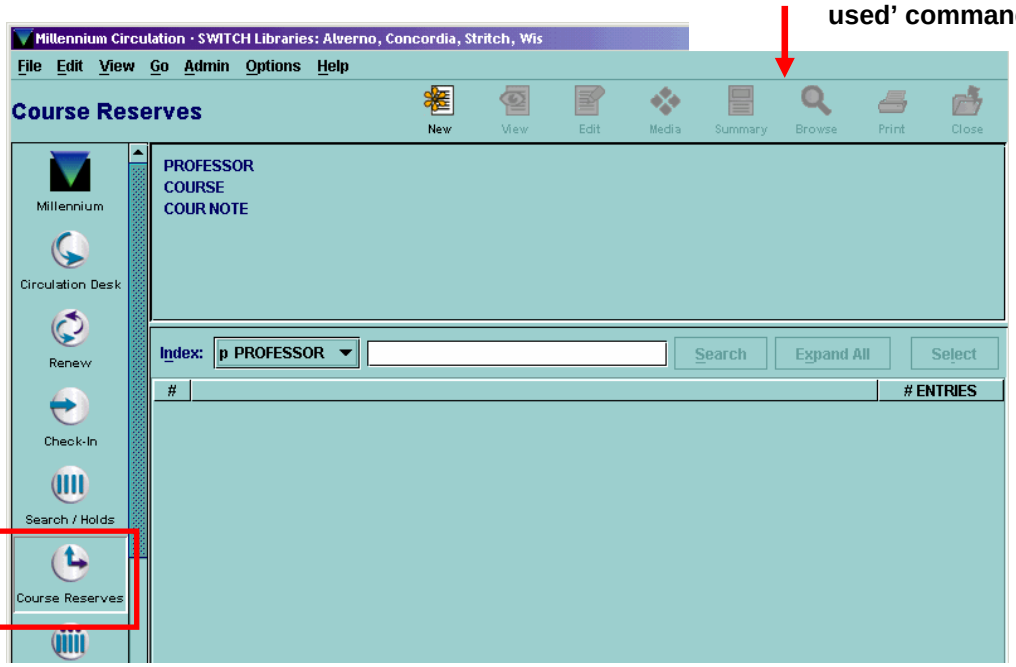
## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password.

## Millennium Circulation will then come up:

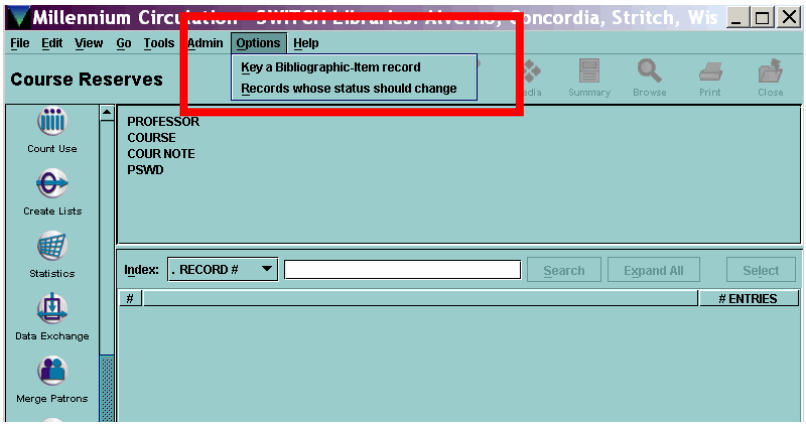
**TOOLBAR features 'commonly-used' commands.**

**MAIN MENU**

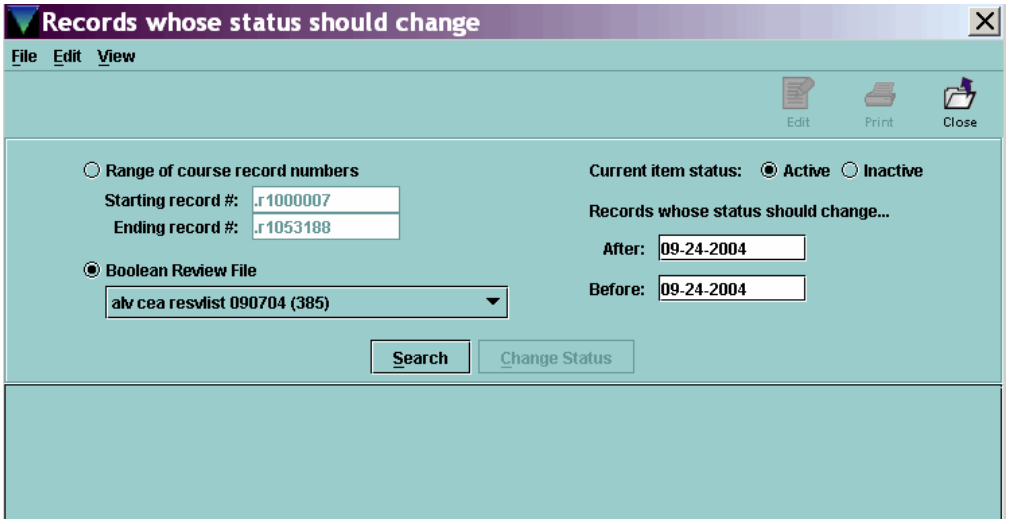



**NAVIGATION BAR**

1. Go to the **COURSE RESERVES** mode.
2. Go up to the main menu and choose **Options | Records whose status should change**.




3. Millennium Circulation will then display that looks like the one below:




4. From this screen, you'll want to search for records using a BOOLEAN REVIEW FILE (list of reserve records) you've already created (of your library's reserve records). If you need to create a list of reserve records, go to the Create Lists mode of Millennium Circulation and then come back at another time.

5. Under the **Current Item Status** option, choose to view records whose status is currently **Active** or **Inactive.**

6. Under the **Records whose status should change** area, use the **After** and **Before** boxes to specify the date(s) during which the status of the records should change. You can specify a singe day by entering the same day in both boxes.

7. Choose **Search** to initiate the request.

8. The system will bring up any matching bib & item records listing them at the bottom of the screen.

9. From here, you can:

    - View either the bib or item record for any record listed. To do so, select the line, and **RIGHT-CLICK ONCE**, then choose either the **View this Bib** command or the **View this Item** command.
    - Print the list of records by choosing the **Print** button on the toolbar or **File | Print Table (Standard Printer)**.
    - Change the status of one or more items in the list by selecting the items by line and then choosing the **Change Status** button.

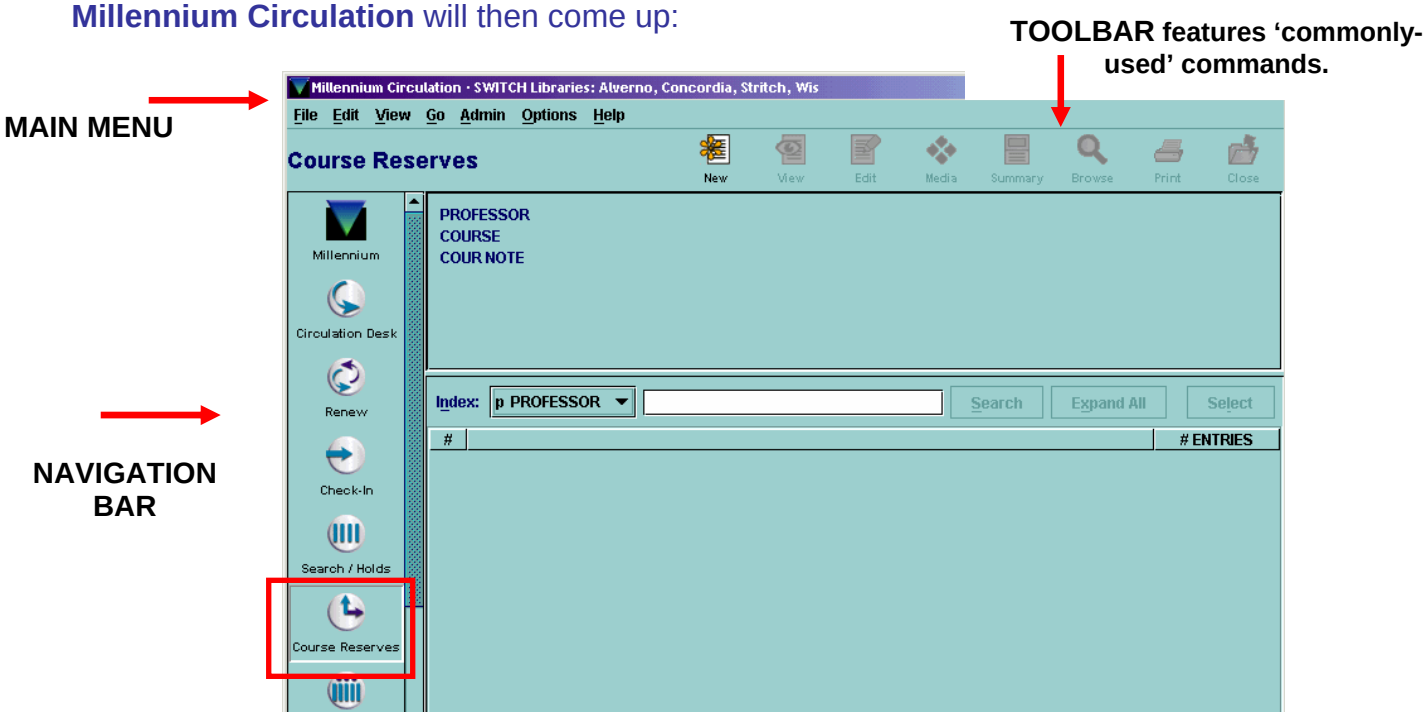
# Millennium Reserves – CHANGING THE STATUS ON ITEMS ATTACHED TO A RESERVE RECORD #100261

**NOTE: A reserve record is considered ACTIVE if at least one active record is attached to the reserve record. A reserve record is consider INACTIVE if all of its attached records are inactive or if no records are attached to the reserve record.**

## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password.

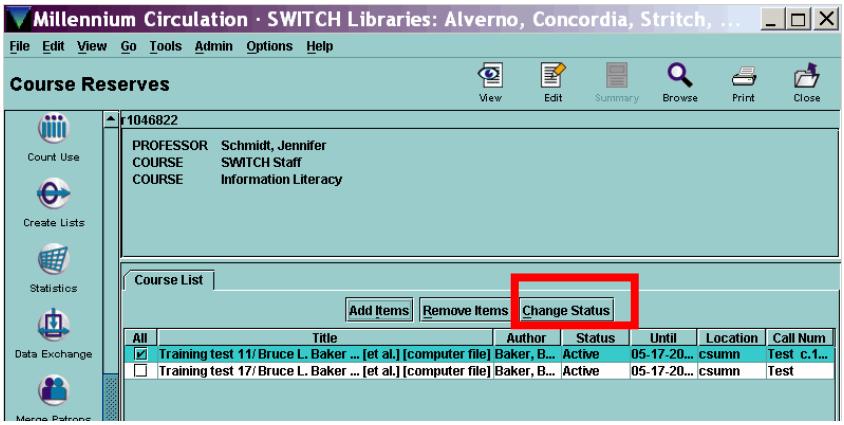
## Millennium Circulation will then come up:




**To change the active/inactive status of a bib/item attached to a course, you can either follow the instructions to LIST RECORDS WHOSE STATUS SHOULD CHANGE, or manually bring up a specific reserve record and change the status on one or more attached records. These instructions will cover the later choice.**

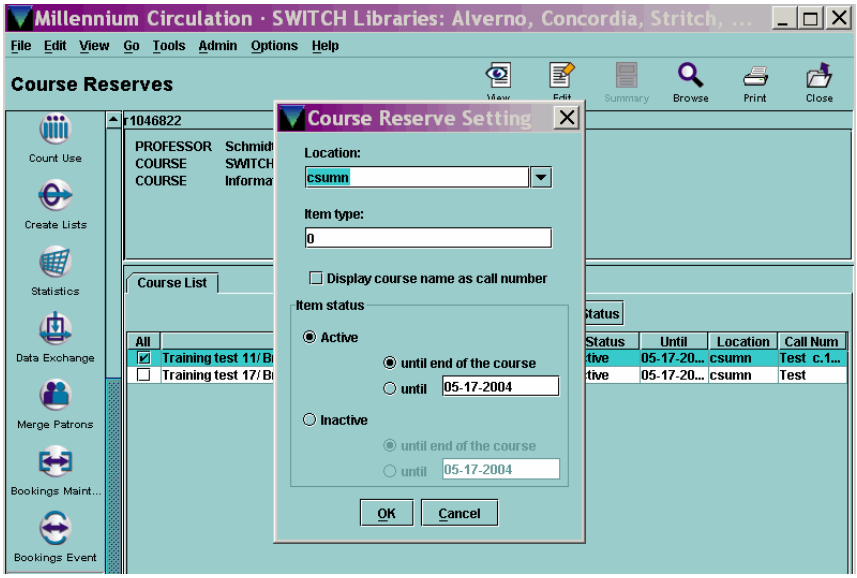
### CHANGING THE STATUS ON INDIVIDUAL RECORDS ATTACHED TO A RESERVE RECORD

1. Go to the **COURSE RESERVES** mode.
2. Search for an existing reserves record in TOPCAT (by p for professor's name or r for course name).
3. Highlight & select the correct reserve record. (It will then display at the top of the Millennium main window). See the image below:


Millennium Circulation · SWITCH Libraries: Alverno, Concordia, Stritch, ...
File Edit View Go Tools Admin Options Help
Course Reserves
View Edit Summary Browse Print Close
Count Use
Create Lists
Statistics
Data Exchange
Merge Patrons
r1046822
PROFESSOR Schmidt, Jennifer
COURSE SWITCH Staff
COURSE Information Literacy
Course List
Add Items
Remove Items
Change Status
All Title Author Status Until Location Call Num
Training test 11/ Bruce L. Baker ... [et al.] [computer file] Baker, B... Active 05-17-20... csumn Test c.1...
Training test 17/ Bruce L. Baker ... [et al.] [computer file] Baker, B... Active 05-17-20... csumn Test

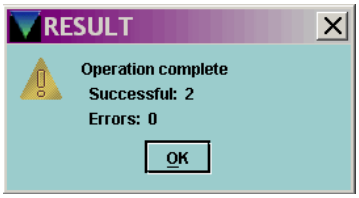
4. Select one or more of the attached records whose status you want to change.

5. Choose the **Change Status** button. Millennium Circulation will prompt you to change the **Course Reserve Settings** for the highlighted records. You now need to make changes based on whether the status is changing from Active to Inactive or vice versa. The fields to change include: the **LOC and ITYPE fields** (ignore the ITYPE field unless you have set up something with the SWITCH Office), the **ITEM STATUS. (Active or Inactive)**. You can also set whether or not you want the **course name to display as the call number.** See the image below:




6. Make the necessary changes depending on whether you are changing the record(s) to be ACTIVE or INACTIVE. Then choose OK.

7. Millennium Circ will display a confirmation dialog box letting you know the number of records whose status changed successfully as well as how many errors there were.




8. If you need to print the table you can do so by choosing Print button on the toolbar or **File | Print Table (Standard Printer)** from the main menu.

9. Choose the **Close** button to return to the main Reserves mode (or **File | Close** from the main menu).

# Millennium Reserves - ATTACHING ITEMS FROM THE LIBRARY COLLECTION TO A RESERVE RECORD

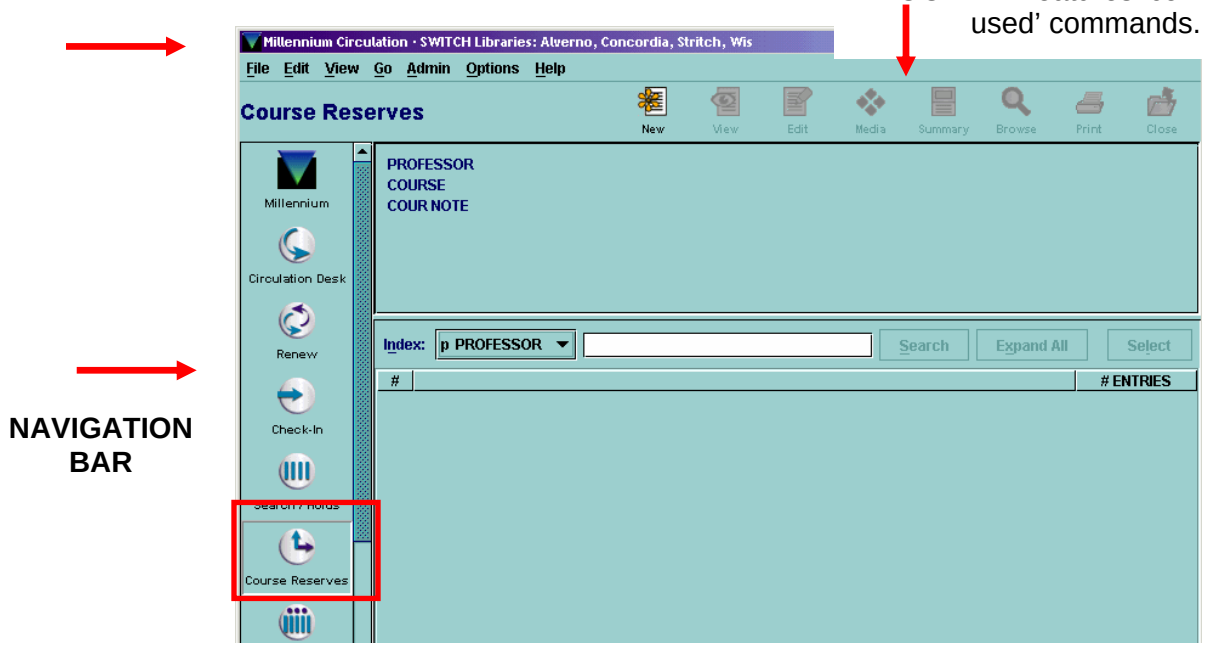
These instructions assume you have already created a reserve record. If you have not, please see the instructions for Creating a New Reserve Record on the SWITCH Staff Support web page.

## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password for Mil Circ.

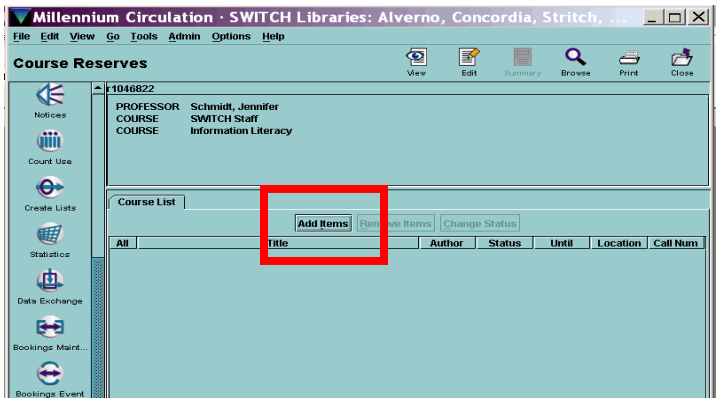
**Millennium Circulation** will then come up:

TOOLBAR features 'commonly-used' commands.

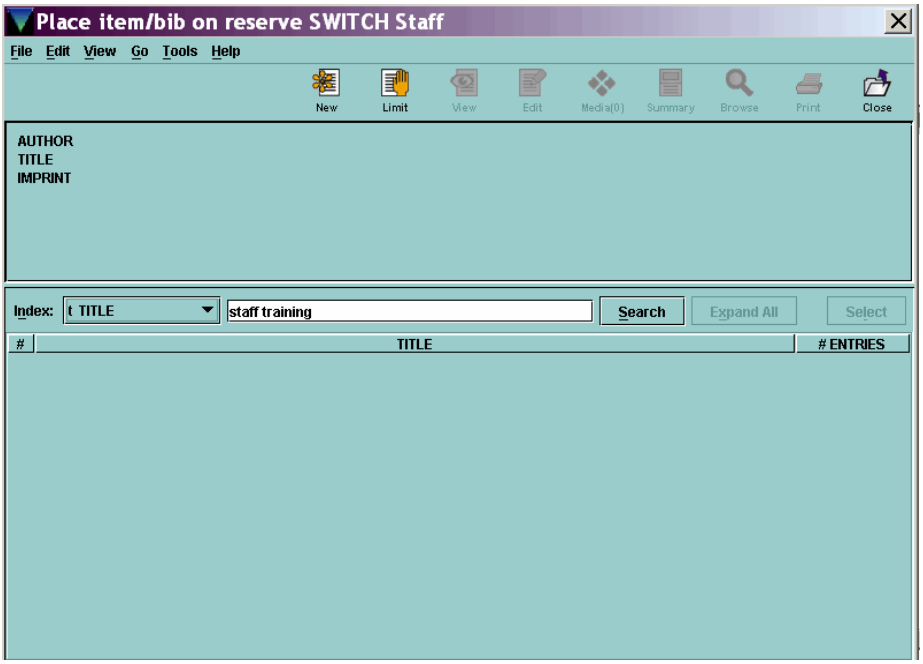



**NAVIGATION BAR**

4. Make sure you are in the **COURSE RESERVES** mode.
5. **Search for an existing course reserve [r] record** (by professor's last name or by course name). If there is no reserve record, follow the instructions for Creating a New Reserve Record.
6. Highlight & select the correct reserve record to bring it up. It will then display at the top of the Millennium main window.
7. Click on the **ADD ITEMS** button in the middle of the screen to search for items in your library's collection that are in TOPCAT.

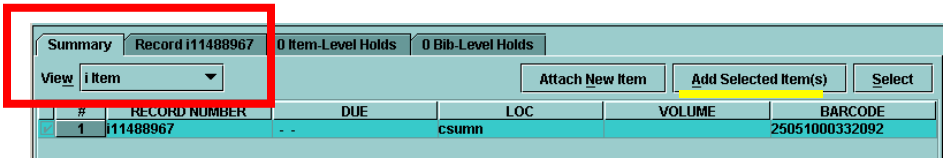



8. The system will bring up a new window “Place item/bib on Reserve”. From here, you will search for a specific bib/item and then add it to the reserve record you have up. Search for the desired item using whichever index you prefer. In the example below we are using the Title index to search for a work titled “Staff Training.”




9. Select the correct record you need. Double-click on the desired line to bring up the bib with all of its attached records. If you select the wrong record and need to go back, click the **Browse** button on the toolbar.

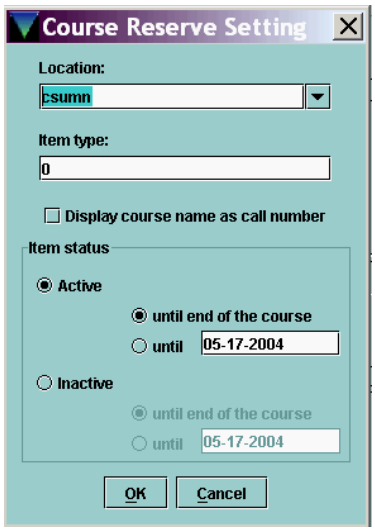
10. In the middle and the left of the screen, locate the **Summary** tab. Be sure the View area is displaying ITEM records. When viewing the attached item records, please check the *LOC code* to make sure the record *begins with your school's abbreviation/your record!*




11. When you locate the correct item record, click on the **Add Selected Item** button to attach the item record to your course reserve record.

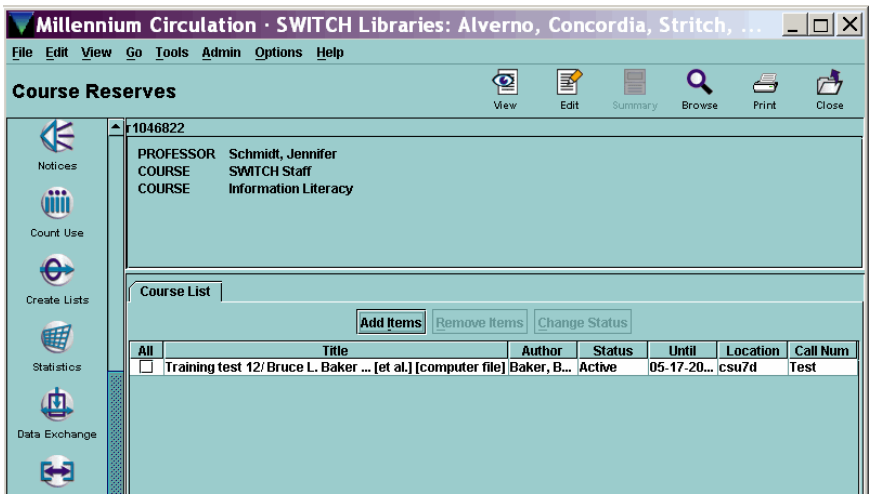
12. If, by chance, you are under the **Item record tab**, then choose the **Add Item** button (which will also attach the record to the reserve record).

13. Fill in the **Course Reserve Settings box** that pops up.




- The LOC code represents your school's reserve location (e.g., sfres). Use the pull down arrow to locate the correct code or type it in.
- I TYPE (leave at 0, unless your library has a code set up….CSU does)
- DISPLAY COURSE NAME AS THE CALL NUMBER (optional, depending on your school's needs)
- ACTIVE UNTIL DATE (highlight this radio button and enter in a date that the reserve item will be active until. This date will help you retrieve reserve items later to put into a list (review file). You may want to use the **same Active Until Date** for all reserve records each semester).

14. The system will return you to the reserve record and display the item(s) you have attached.




15. Continue to add items from your library's collection to a reserve record (Course List) using the **Add Items** button.

16. Use the **Close** button to close out of the reserve record when you are done adding items.

## VIEWING A RESERVE RECORD IN TOPCAT:

a) Go to TOPCAT, the online catalog (http://topcat.switchinc.org)
b) Search for your reserve record either by professor's last name or by course name
c) View the reserve record and the attached items
d) Make changes in Millennium Circulation | Course Reserves mode accordingly.

# Millennium Reserves – ATTACHING A BIB & ITEM TO A RESERVE RECORD

#100256

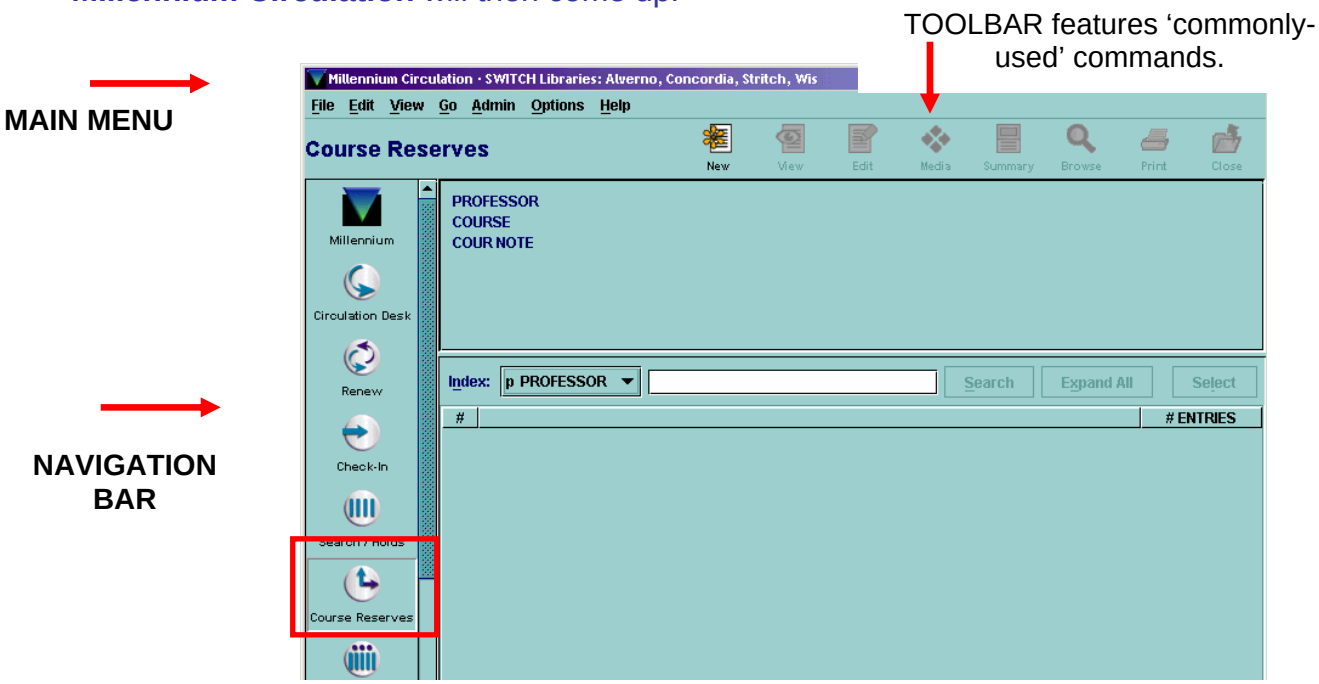
**IMPORTANT: Follow these instructions for reserve items that are *Personal Copies, Photocopied Items, &/or PDF's/E-Reserves***

For personal copies of materials, photocopied articles and e-reserve items, there must be a bib & item attached to a reserve record. Follow these steps to create a new brief bib & item record. IMPT: If you **already** have a bib/item created & attached to a reserve record and you simply want to IMPORT A PDF into a reserve record, see the instructions under Importing PDF's into a Reserve record.

## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password to login to Mil Circ.

**Millennium Circulation** will then come up:



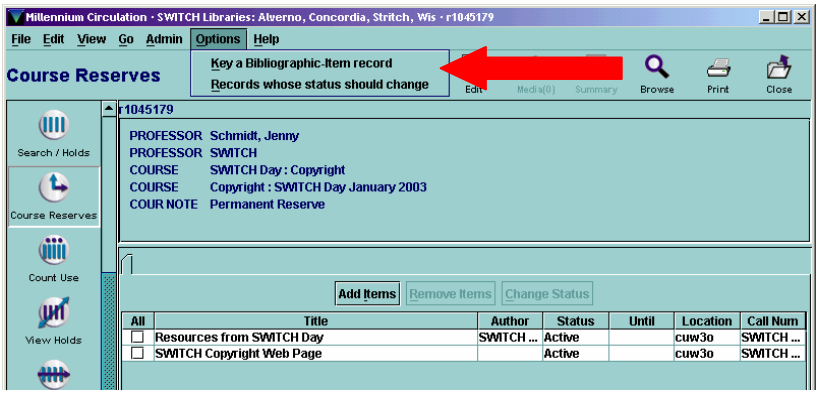

4. Make sure you are in the **COURSE RESERVES** mode.

5. **Search for an existing course reserve [r] record** (by professor's last name or by course name). If there is no reserve record, follow the instructions for Creating a New Reserve Record.

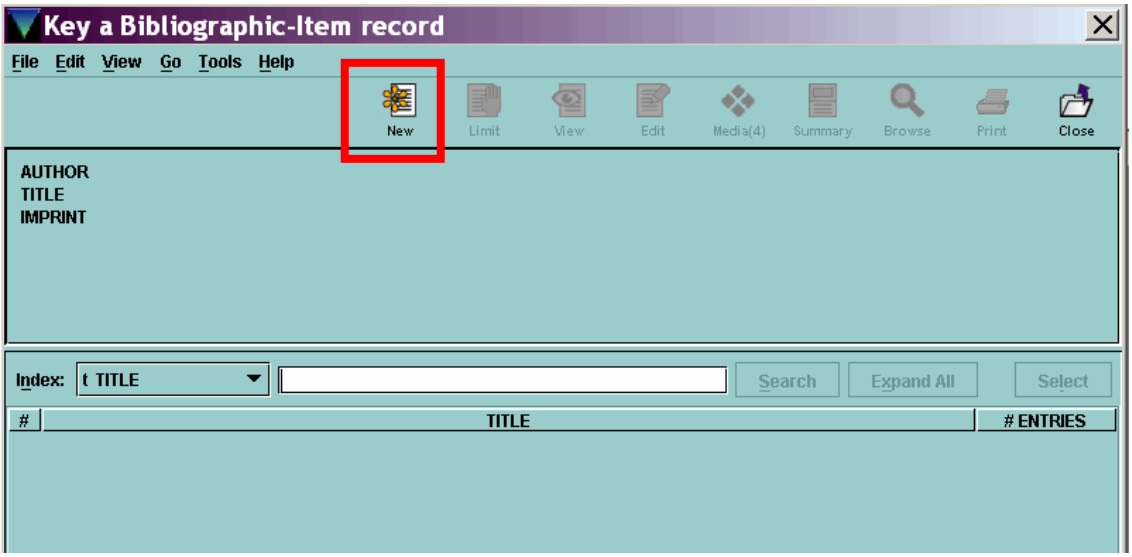
6. Highlight & select the correct reserve record to bring it up. It will then display at the top of the Millennium main window.

For personal copies, photocopied articles and e-reserve items, there must be a bib & item attached to a reserve record. Follow these steps to create a new brief bib & item record. IMPT: If you **already** have a bib/item created & attached to a reserve record and you simply want to IMPORT A PDF into a reserve record, see the instructions under Importing PDF's into a Reserve record.

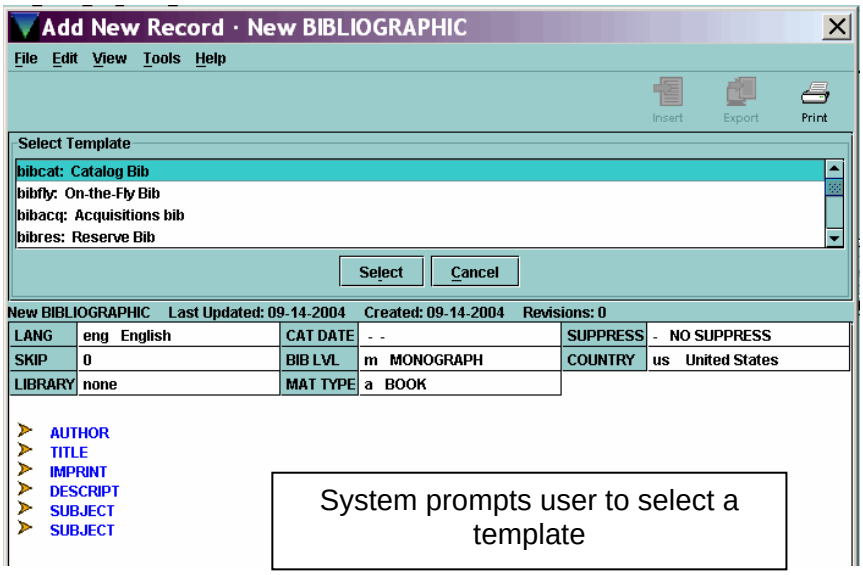
7. To create a new bib & item, go to the main menu and select **Options | Key a New Bib/Item Record**.




8. The system will bring up a new window “Key a Bibliographic-Item Record”. From here, you can search for an existing bib & item if they are created, or click the **New** button to create new bib & item records. Again a brief bib and item record is necessary for any personal copies, photocopies and PDF’s.



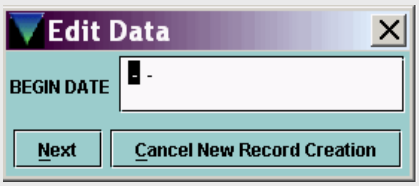

9. To create a new bib & item, click on the **NEW** button from the toolbar.
10. The system will prompt you to select a bib (and then an item( record template from which you will create the new record. It will look something like the example below. Select the appropriate **Reserve** template for your library.



11. Fill in the necessary field information for the new bib record. Be sure the following fields are filled and do NOT use MARC tags:
    - LIB (your school code)
    - BIB LVL (monograph)
    - MAT TYPE (a for book)
    - SUPPRESS (y for yes)
    - AUTHOR (last name, first name)
    - TITLE (Title)
    - Any other fields needed. [Complete the template, then click the **Insert** button & choose a field].

**OPTIONAL WIZARD TO CREATE NEW RECORDS**

Each login ***can*** be set to use a WIZARD to create new records. A wizard is a *series of dialog boxes that display as you fill in information to create a new record*. In other words, for each field of a given record template, the system will prompt you with a dialog box to fill in the data needed. For example,

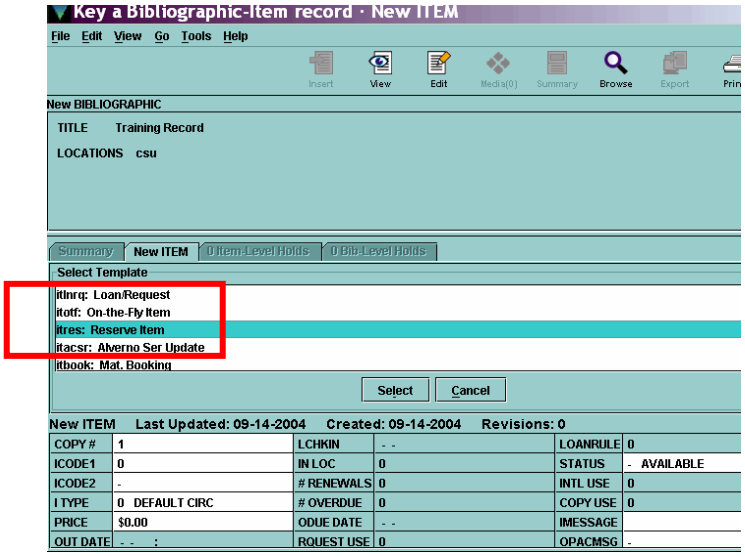



You then choose **Next** to go to the next dialog box representing the next field. At the end, you save. Contact the SWITCH office if you'd like to change this setting to not use a wizard. In that case, you will be presented with the new record template to edit the fields. No dialog boxes will display. This is set on a login by login basis.

A FEW POINTS

- When creating a new bib or item, the **DUPLICATE RECORD FOUND** screen may pop up, choose the **CLOSE button** to continue creating your new records.
- You will not save the record until you are finished creating both the new bib & new item records.
- You may click the Cancel button or Alt+S to close out and cancel creating the new bib record.

12. After creating a new bib, the system prompts you to select the correct **item** record template from which you will create the new record. Select the appropriate **Reserve** template for your library.


Key a Bibliographic-Item record - New ITEM
File Edit View Go Tools Help
Insert View Edit Media(0) Summary Browse Export
New BIBLIOGRAPHIC
TITLE Training Record
LOCATIONS csu
Summary New ITEM 0 Item-Level Holds 0 Bib-Level Holds
Select Template
itlnrq: Loan/Request
itotf: On-the-Fly Item
itres: Reserve Item
itacsr: Alverno Ser Update
itbook: Mat. Booking
Select Cancel
New ITEM Last Updated: 09-14-2004 Created: 09-14-2004 Revisions: 0
COPY # 1 LCHKIN - - LOANRULE 0
ICODE1 0 IN LOC 0 STATUS - AVAILABLE
ICODE2 - # RENEWALS 0 INTL USE 0
I TYPE 0 DEFAULT CIRC # OVERDUE 0 COPY USE 0
PRICE $0.00 ODUE DATE - - IMESSAGE
OUT DATE - - : RQUEST USE 0 OPACMSG -

**CREATING & EDITING TEMPLATES**
To create a new template or edit an existing template, go to **Admin | Settings | Templates**. For more information, see **Managing Templates for New Records**, # 105825 of the Innovative user manual, or contact the SWITCH office.

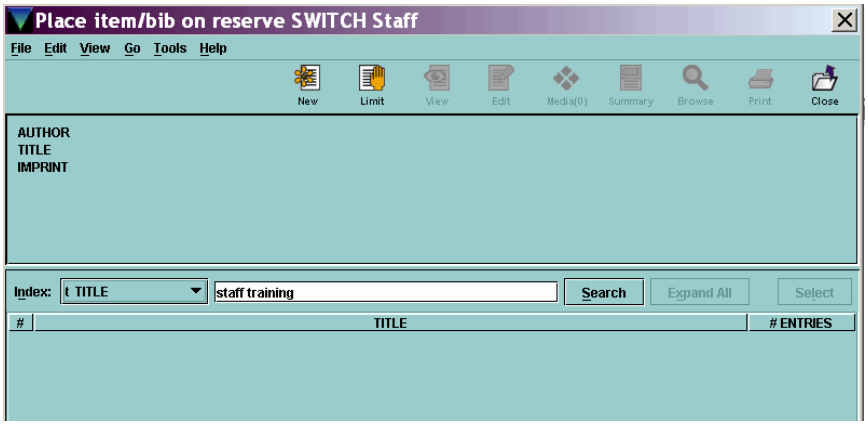
13. Fill in the NEW ITEM RECORD template. Be sure that the following fields are filled:
    a. **LOC** (use a code that indicate the item is on reserves…i.e., sfres)
    b. **ITYPE** (should be 0, unless you have connected with the SWITCH office to set up)
    **c. COPY No.**
    **d. BARCODE**
    e. **VOLUME** (insert call number information here! It will display where the call no. info goes)
    f. **AGENCY** (optional for these records)
    g. **NOTE** (i.e., Personal Copy or other notes. When the item is removed from a reserve record, the system automatically inserts a note into the item record including a date when it was removed.)
    h. Any other fields you need. [press Enter in the variable field area or click the **Insert** button on the toolbar to insert a new variable field.].

14. When you finish filling in data for each required field of the item record template, save the record by selecting the **Save** button on the toolbar, or Ctrl+S.

15. Click the **Close** button on the toolbar and you will return back to the reserve record.

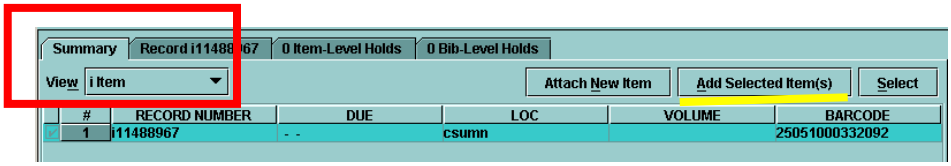
16. Now click the **Add Items** button.

17. The system will bring up a new window "Place item/bib on reserve". From here, you will search for the new bib & item you just created and add them to the reserve record. Search for the bib & item using whichever index you prefer. Typically searching by title or barcode is the best way to retrieve specific items quickly.



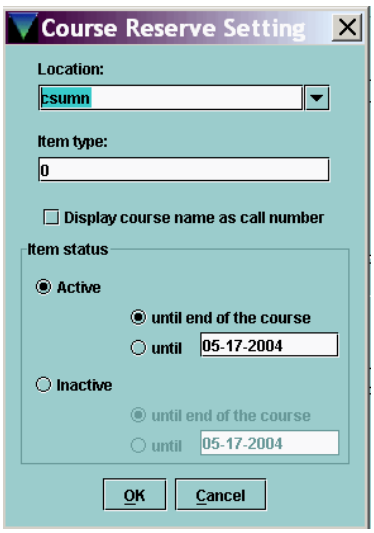

18. Select the correct record you need. Double-click on the desired line to bring up the bib with all of its attached records. If you select the wrong record and need to go back, click the **Browse** button on the toolbar.

19. In the middle and the left of the screen, locate the **Summary** tab. Be sure the View area is displaying ITEM records. When viewing the attached item records, please check the *LOC code* to make sure the record *begins with your school's abbreviation/your record!*



20. When you locate the correct item record, click on the **Add Selected Item** button to attach the item record to your course reserve record. If, by chance, you are under the **Item record tab**, then choose the **Add Item** button (which will also attach the record to the reserve record).

21. Fill in the **Course Reserve Settings box** that pops up.




- The LOC code represents your school's reserve location (e.g., sfres). Use the pull down arrow to locate the correct code or type it in.
- I TYPE (leave at 0, unless your library has a code set up….CSU does)
- DISPLAY COURSE NAME AS THE CALL NUMBER (optional, depending on your school's needs)
- ACTIVE UNTIL DATE (highlight this radio button and enter in a date that the reserve item will be active until. This date will help you retrieve reserve items later to put into a list (review file). You may want to use the **same Active Until Date** for all reserve records each semester).

22. The system will return you to the reserve record and display the item(s) you have attached.

23. If you are creating the bib & item for HARDCOPIES ONLY (of personal materials or photocopied articles/chapters) you are done. Hooray!

    If you need to also include ELECTRONIC FILES. You will need to import and attach each one to the corresponding item record (you just created) and then attach to the reserve record. See the instructions for Importing a PDF into a Reserve Record to complete this task.

**If you have multiple bib & items to create for a course, you may want to do them all at once using the *Options | Key a Bibliographic-Item record* command. Then end this task by adding them as a batch to the given reserve record.**

# Millennium Reserves – CREATING PDF'S USING ADOBE ACROBAT

These instructions assume that you have already created reserve records, created a new bib & item for the work (See Attaching a Bib & Item to a Reserve Record) and scanned the document(s) you need. Following the creation of PDFs you will need to import the PDFs into TOPCAT using the Millennium Media Manager found in MilCirc.

## Creating PDF files

Your originals should be single-sided and be in good condition. If they are not, it is recommended that you make new single-sided copies on a photocopier before attempting to scan them using the **ADF** (**Automatic Document Feeder**).

1. Begin by inserting the document into the ADF of the scanner. Make sure the purple lever is at the forward or #1 position. Insert the documents face-up, and then move the lever back to the #3 position.

2. Open Adobe Acrobat software.

3. With the mouse, go to the main menu at top & choose: **File > Create PDF > From Scanner**

4. Click on the **Scan** button

   [STEPS 5-6 Don't Apply to SFS' scanner]

5. This will now open HP Precision Scan Pro to do the actual scanning. Click on the **Load Settings** button. (NOTE: It may take a little while for this to come up!)

6. Make sure **ADF Letter Scan** appears in the window and select **Load**. (If you get lost look on the main menu under **Scan | Load Settings**, but again, it might just be slow.)

7. Click the **Scan** button. The scanner will now scan the documents you placed in the ADF.

8. When it finishes scanning all the documents in the ADF it will ask you if you are Done, or if there are more pages to scan. At this point if you are done simple click the **Done** button. If you have more pages to add, click the **Next** button. You will then need to go back to Step #5 and Load Settings again. (If you get lost look on the main menu under **Scan | Load Settings**, but again, it might just be slow.)

9. When you click **Done**, Acrobat will show you the scanned documents. Make sure the scans look good and that all the pages are there.

10. Use the mouse to go to **File:Save As** and save the document in a place that you have created on your hard drive for saving Electronic reserve documents.

11. At this point, if you have more documents to scan you can go to **File:Close** to close the current document, and then go back to Step #1 to scan additional documents.

12. Now follow the instructions for Importing a PDF File into a Reserve Record.

# Millennium Reserves – IMPORTING PDFs INTO A RESERVE RECORD

**IMPORTANT: Follow these instructions for PDFs to be put on reserve as electronic reserve items.**

To import PDF's, there must be a bib & item attached to a reserve record. If you have not done so already follow the instructions above for Attaching a Bib & Item to a Reserve Record. This is needed for any e-reserve item.

## Accessing Millennium Circulation

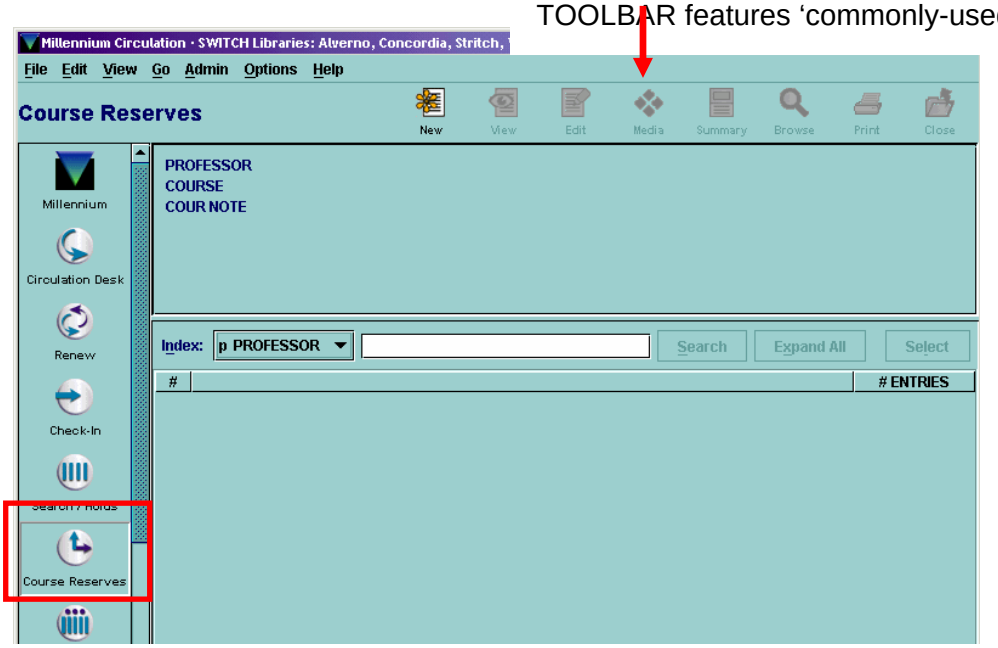
1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password to login to Mil Circ.

**Millennium Circulation** will then come up:

TOOLBAR features 'commonly-used' commands.

MAIN MENU

NAVIGATION BAR




4. Make sure you are in the **COURSE RESERVES** mode.

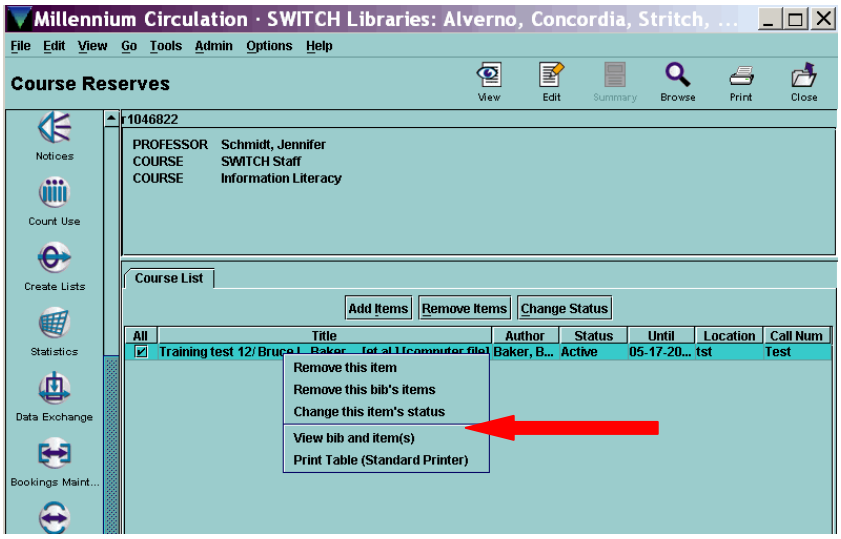
5. **Search for an existing course reserve [r] record** (by professor's last name or by course name). If there is no reserve record, follow the instructions for Creating a New Reserve Record.

6. Highlight & select the correct reserve record to bring it up. When you retrieve the record you will see all attached items at the bottom of the Millennium window. **To import PDF's, there must be a bib & item attached to a reserve record.** If there are NO items attached (for personal copies, photocopied articles and e-reserve items), follow the instructions for Attaching a Bib & Item to a Reserve Record. If you **already** have a bib/item created & attached to a reserve record you are ready for the next step!

7. With your reserve record at the top and attached items at the bottom of the Millennium window, select the correct item record that corresponds with (MATCHES) the PDF file.

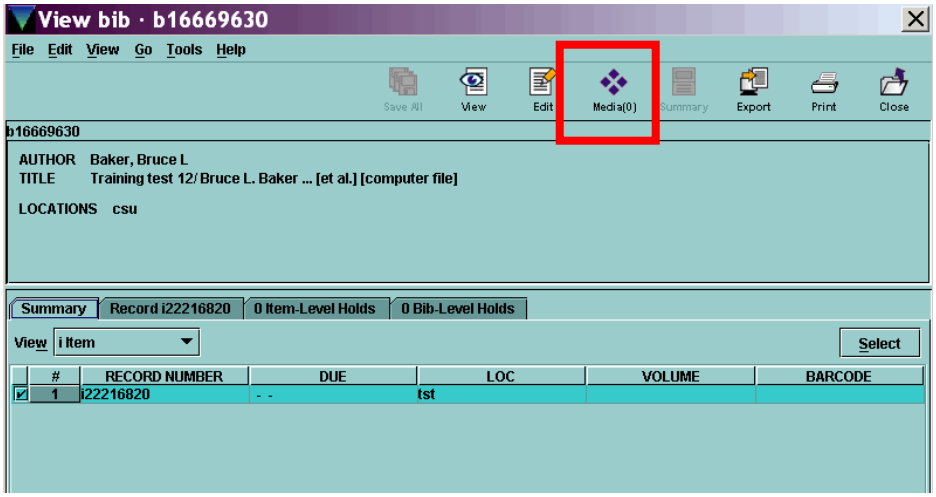
8. Highlight the line item you want to attach the PDF to and **RIGHT CLICK** once.

9. Choose the **View bib & item** command from the menu.

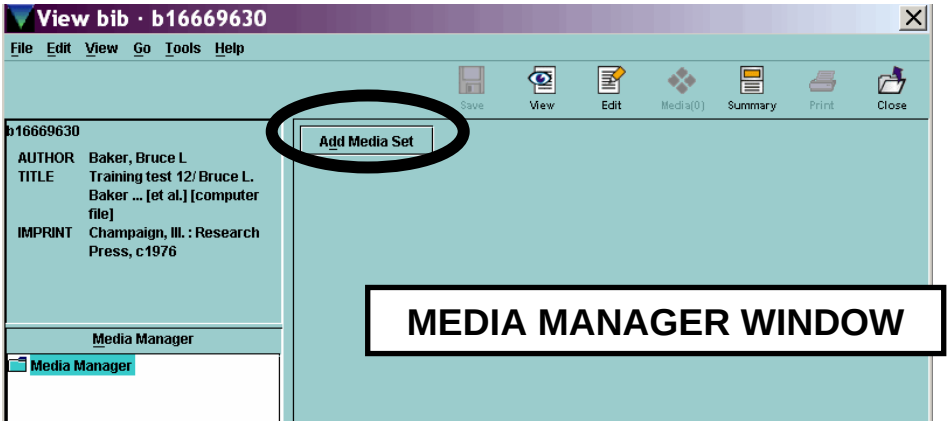

Millennium Circulation · SWITCH Libraries: Alverno, Concordia, Stritch, ...
File Edit View Go Tools Admin Options Help
Course Reserves
View Edit Summary Browse Print Close
Notices
Count Use
Create Lists
Statistics
Data Exchange
Bookings Maint...
r1046822
PROFESSOR Schmidt, Jennifer
COURSE SWITCH Staff
COURSE Information Literacy
Course List
Add Items Remove Items Change Status
All Title Author Status Until Location Call Num
Training test 12/ Bruce L. Baker [et al.] [computer file] Baker, B... Active 05-17-20... tst Test
Remove this item
Remove this bib's items
Change this item's status
View bib and item(s)
Print Table (Standard Printer)

10. With the bib & item displaying, click on the MEDIA button

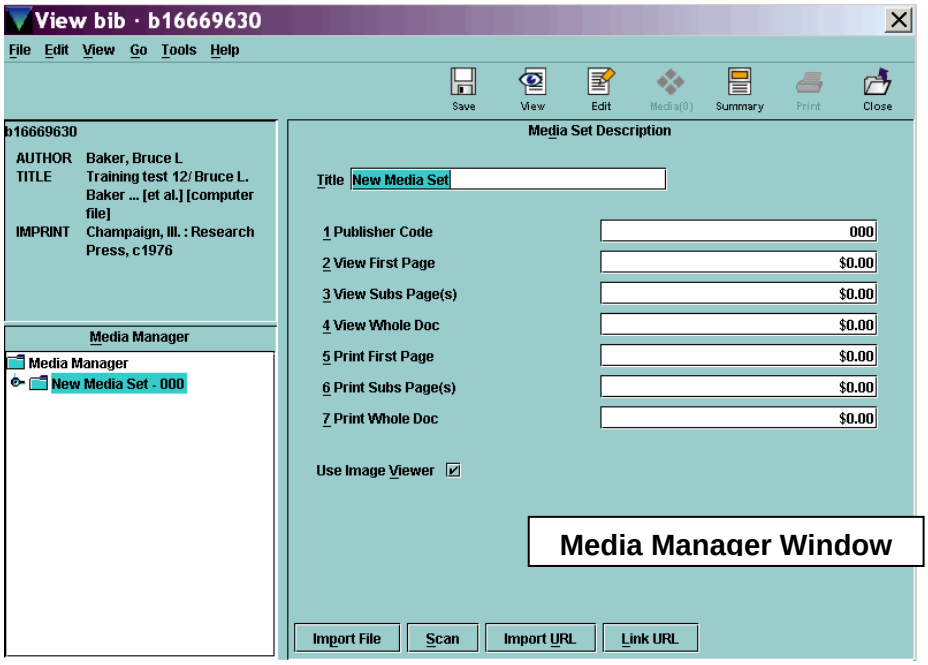
on the toolbar. (See below)


View bib · b16669630
File Edit View Go Tools Help
Save All View Edit Media(0) Summary Export Print Close
b16669630
AUTHOR Baker, Bruce L
TITLE Training test 12/ Bruce L. Baker ... [et al.] [computer file]
LOCATIONS csu
Summary Record i22216820 0 Item-Level Holds 0 Bib-Level Holds
View i Item
Select
# RECORD NUMBER DUE LOC VOLUME BARCODE
1 i22216820 - - tst

11. Click on the **Add Media Set** button.


View bib · b16669630
File Edit View Go Tools Help
Save View Edit Media(0) Summary Print Close
b16669630
AUTHOR Baker, Bruce L
TITLE Training test 12/ Bruce L. Baker ... [et al.] [computer file]
IMPRINT Champaign, Ill. : Research Press, c1976
Add Media Set
MEDIA MANAGER WINDOW
Media Manager
Media Manager

12. The system asks you to complete a new Media Set Description by filling out the form in the Millennium Media Manager window.


View bib · b16669630
File Edit View Go Tools Help
Save View Edit Media(0) Summary Print Close
b16669630
AUTHOR Baker, Bruce L
TITLE Training test 12/ Bruce L. Baker ... [et al.] [computer file]
IMPRINT Champaign, Ill. : Research Press, c1976
Media Manager
Media Manager
New Media Set - 000
Media Set Description
Title New Media Set
1 Publisher Code 000
2 View First Page $0.00
3 View Subs Page(s) $0.00
4 View Whole Doc $0.00
5 Print First Page $0.00
6 Print Subs Page(s) $0.00
7 Print Whole Doc $0.00
Use Image Viewer
Media Manager Window
Import File
Scan
Import URL
Link URL

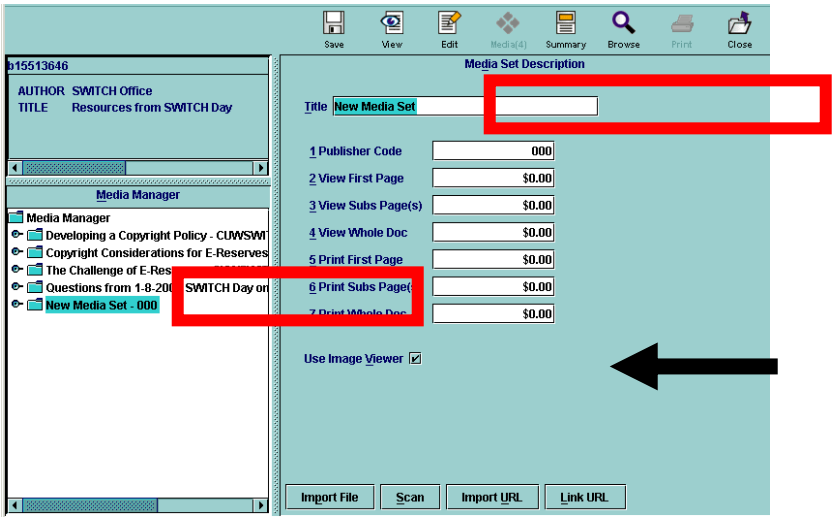
**IMPORTANT:**
**The system requires separate folders for each type of media (e.g., web sites vs. PDF files vs. sound files, etc.) AND there can only be ONE PDF PER FOLDER. In other words, each folder represents**

13. Fill in the first **2** fields of the **Media Set Description** box (below):

**TITLE** : You'll likely want to use the name of the article/chapter for the title. Whatever you fill in for the title will display at the left of the Media Manager window as a folder.

**PUBLISHER CODE :**

The publisher code must begin with your school's abbreviations and can't include spaces or non-alphanumeric characters. This code allows you to view statistics using Mil Web Management Reports (User Access | E-Reserves).



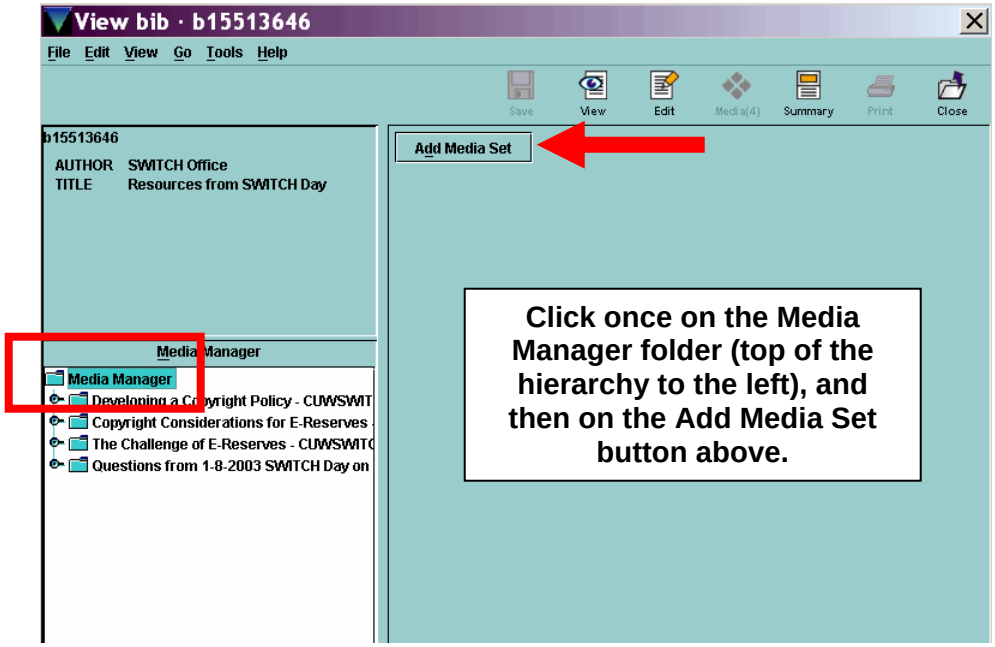

14. **UNCHECK** the **Use Image Viewer** box (enables use of Adobe's viewing software).

15. Click the **Import File** button at the bottom of the Media Manager window.

16. Navigate & find your PDF (as with any file manager), click **Open**. The system will load your PDF under the media set folder.

17. Click the **Save** button [or CTRL s].

18. To add another folder and another PDF to the same ITEM record, click **ONCE** on the **Media Manager** (at the top of the hierarchy or 'tree') and click on the **Add New Media** set button.


View bib · b15513646
File Edit View Go Tools Help
Save View Edit Media(4) Summary Print Close
b15513646
AUTHOR SWITCH Office
TITLE Resources from SWITCH Day
Add Media Set
Media Manager
Media Manager
Developing a Copyright Policy - CUWSWIT
Copyright Considerations for E-Reserves
The Challenge of E-Reserves - CUWSWITC
Questions from 1-8-2003 SWITCH Day on
Click once on the Media Manager folder (top of the hierarchy to the left), and then on the Add Media Set button above.

19. Follow the steps above to fill in the **Media Set Description** box for each new PDF. For an example, of a record that has multiple PDF's attached to one item record, see CUW MSN 551/851 in TOPCAT.

20. The article is now attached to the bib/item record and will appear in TOPCAT when you do a search by the course or instructor name.

**IMPT NOTES TO READ:**

- If you wanted to Link to a URL, choose the **Link URL** button within the Media Manager window and insert the web address including the http://….. (for more information on this, please see #105236 of the manual).

- *You need to have separate folders for each different types of media (e.g., web sites, PDF's, etc.). the Media Manager click on the MEDIA button found on the main toolbar.* **AND** there can only be **ONE PDF PER FOLDER.** In other words, each folder represents one PDF file.

- **You are in charge of removing PDFs**. See **Deleting Electronic Reserve Articles & Bibs**. Basically, what you do is RIGHT CLICK to view the bib & item; click on the Media button to bring up the Media Manager window; highlight the correct media folder/PDF you want to delete, then RIGHT CLICK again and choose the REMOVE command! This removes it from our server. You will then need to CLOSE out of the Media Manager and either change the status or remove the corresponding ITEM record(s)!

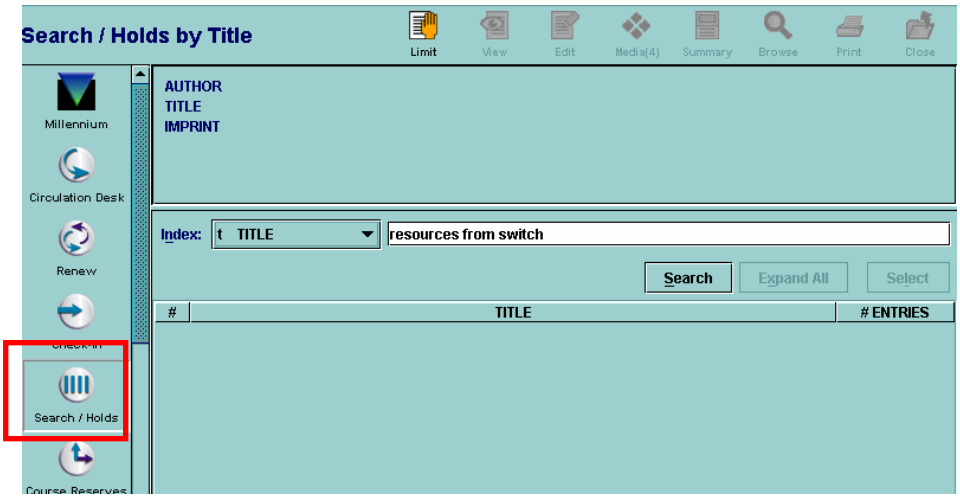
# Millennium Reserves – DELETING PDFs and DELETING BIB/ITEMs FROM A RESERVE RECORD

**IMPORTANT:** Use these instructions to remove the PDF from our TOPCAT server. You must delete the PDF FIRST before deleting the bib/item if you are going to do so. Afterwards, don't forget to either remove or change the status of the associated item record as it applies to the reserve record.

## Accessing Millennium Circulation

1. **Start | Programs | Millennium** (or click on the Millennium icon on your desktop)
2. The Java script box appears & runs; This ALWAYS need to be on (minimized) for MilCirc to work!!!
3. Enter your username and password to login to Mil Circ.

4. Go to the **Search/Holds** mode of Mil Circ. Contact the SWITCH office if this mode does not currently display in Millennium with your given login.




5. Search for the PDF using the **Title** or **Barcode** index (the barcode index can help insure that the item is specifically from your school).

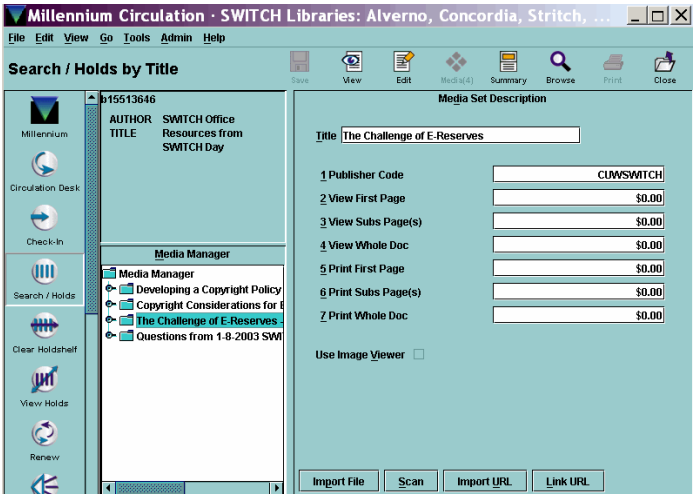
6. Evaluate the record (including LOC code) to confirm it's the right one and select the correct one. Bring up the bib with its attached items.

## TO DELETE JUST ELECTRONIC ITEMS (BUT NOT THE BIB/ITEM)

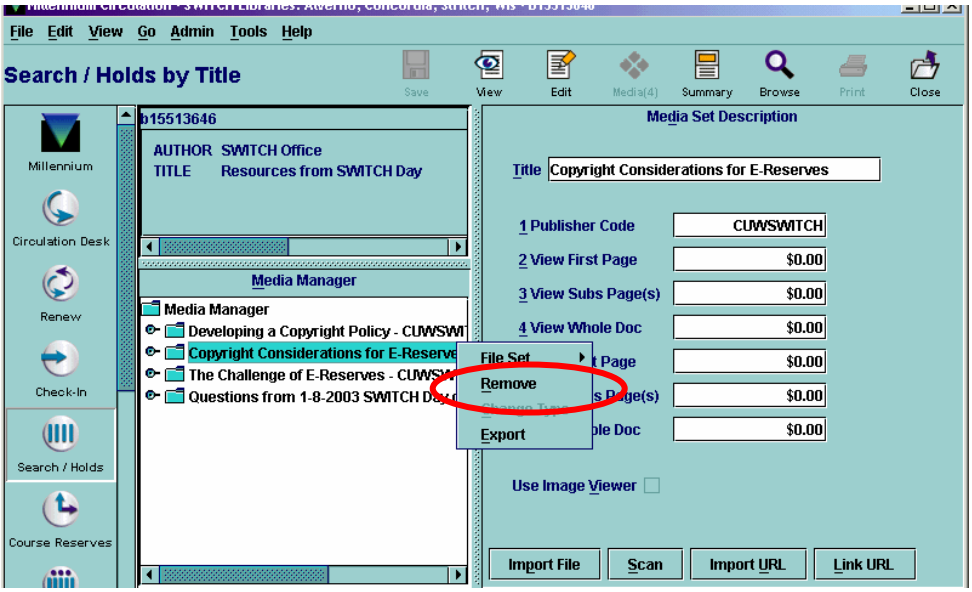
7. Click on the Media button found on the top toolbar.

Once the Millennium Media Manager window is up, click once to highlight the **media set** (folder) you want to delete.

NOTE: To view or delete items within a media set folder, click once on the key (or magnify glass) symbol to turn and expand the folder. (You can then highlight individual items within the folder, right click and choose **Remove** at this level). ***There is only one PDF per folder.***




8. Now **right click once** on the folder you have selected and choose the **Remove** option. ***NOTE: When you delete a media set/folder from the Millennium Media Manager it will delete the file (PDF or other) here and off the TOPCAT server.***



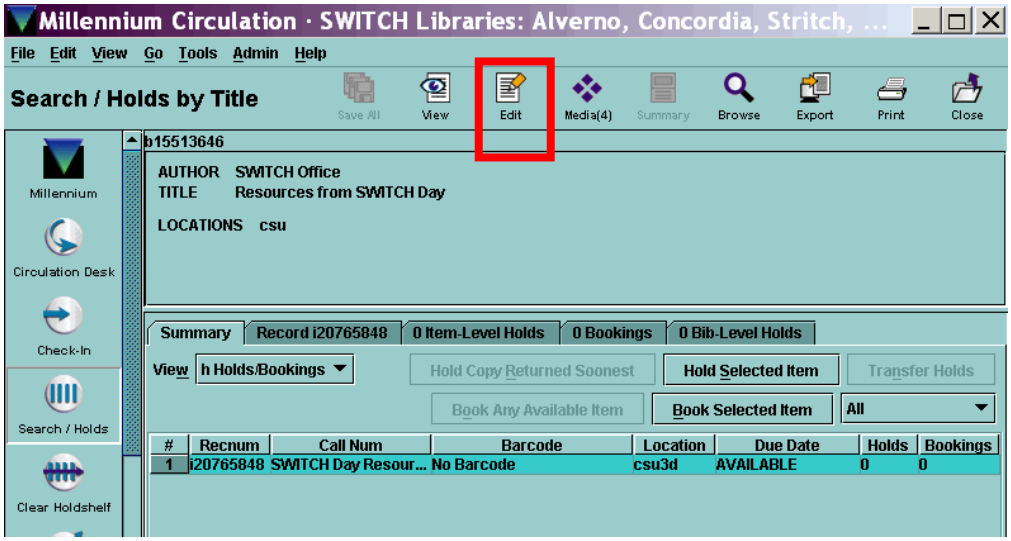

9. Delete any other PDF's you need to from the Media Manager window. Save when you are done by pressing the **Save** button.

## TO DELETE ALL ELECTRONIC ARTICLES & THE BIB/ITEM

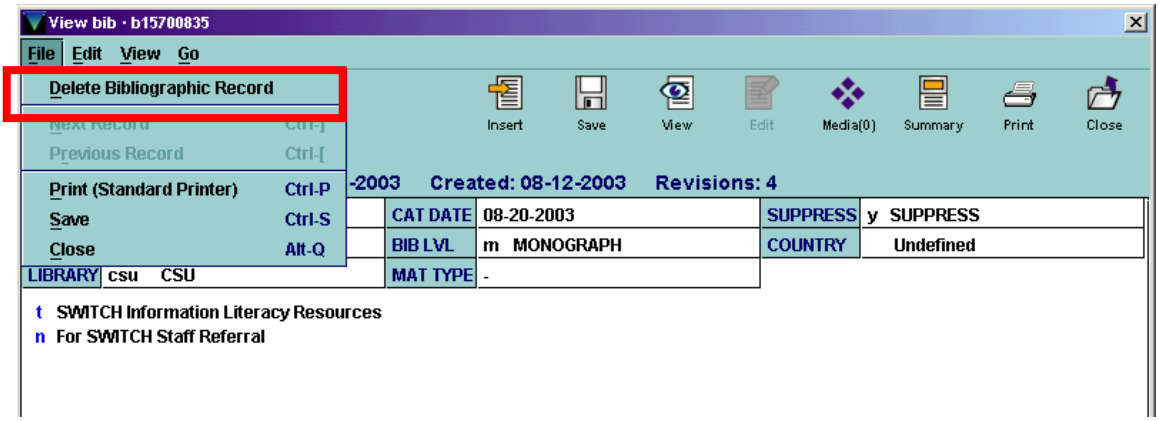
1. Follow the steps above to delete any and all remaining media sets/folders in the item record.

2. **Save** the record and click on the **Summary** button on the toolbar. (The **Close** button will close out of the record in which case you have to run the search for the correct bib/item again.).

3. From the **Summary** screen which looks like the one below, choose the **Edit** button from the toolbar to go into the edit mode of the bibliographic record.




4. Once you are within the Edit Bib screen, go under the File menu and choose the **Delete Bibliographic Record** option.




5. The system will then bring up a dialog box asking if you want to delete the bib as well as all attached records. Choose YES to delete the bib as well as your attached item record(s).

6. After deleting the bib you will be taken back to the search screen of the **Search/Holds** mode.

# Millennium Reserves – DOWNLOADING E-RESERVES STATS FROM WEB MANAGEMENT REPORTS

## Start by Accessing Web Management Reports

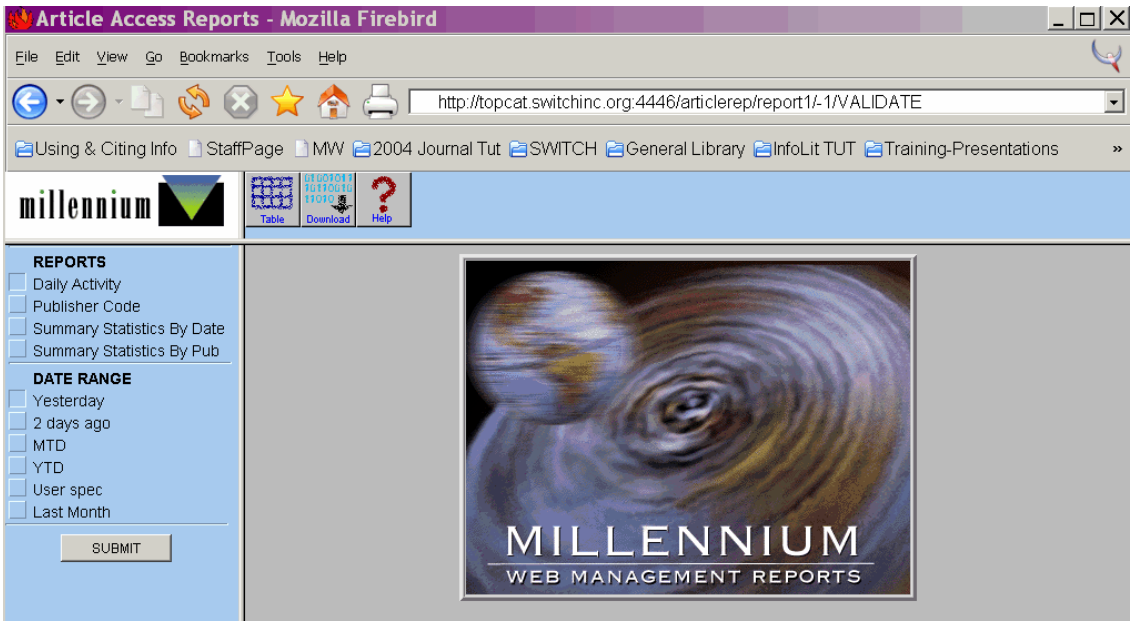
1. Go to: http://topcat.switchinc.org/manage/.
2. Web Management Reports will come up.

### Steps to Locate and Download E-Reserves Statistics

3. Locate the **User Access** category

4. Select the **E-Reserves** button. Enter in your initials and password to access the report.

5. Look at the far left, then select the report you need such as **Summary Statistics by Pub or Publisher Code.** Select the Date Range you need.

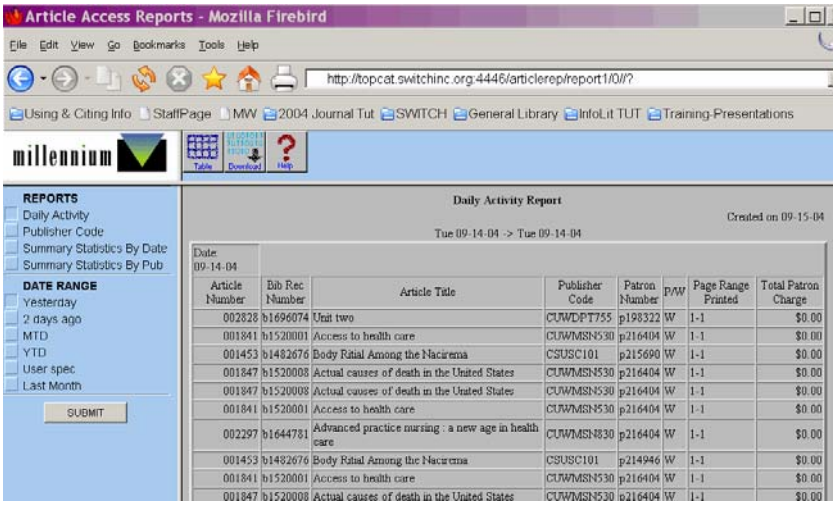


**User Spec stands for User Specifies. This should be used when you want to select multiple months for the timeframe needed.**

7. Click Submit to run the report.

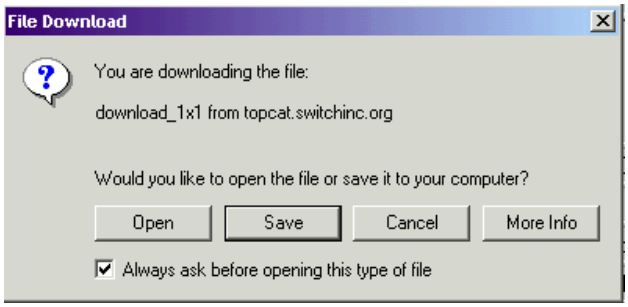
8. If you chose the **User Spec** option, enter the beginning and ending dates and click Go.

9. Your report will now display. Here's one example:




9. To download the report and bring into Excel. Click on the download button found on the toolbar


10. You will receive a **File Download** box asking if you'd like to Open or Save the file.


File Download
You are downloading the file:
download_1x1 from topcat.switchinc.org
Would you like to open the file or save it to your computer?
Open
Save
Cancel
More Info
Always ask before opening this type of file

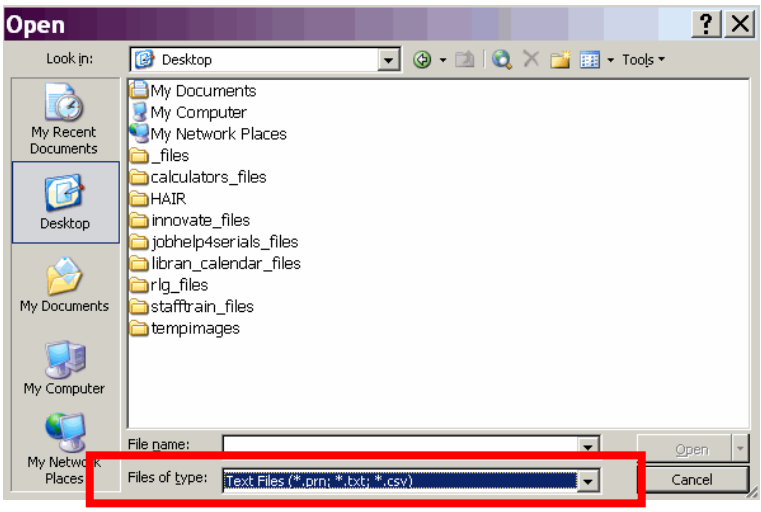
11. Choose the **Save** option and save to the desktop. The file will default to the name, '**download_1x1**'. You may keep or change this.

12. Open Microsoft Excel.

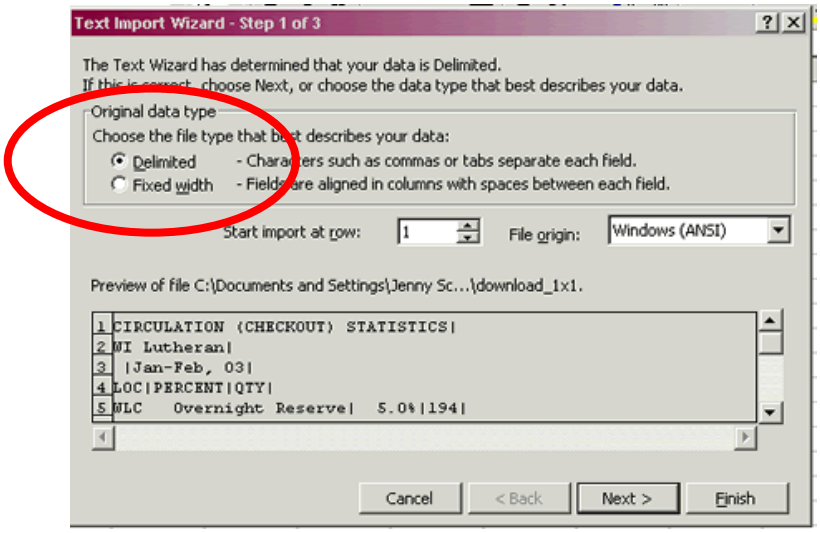
13. Choose the **Open File** command under File on the main menu (or the icon).

14. Navigate to the desktop to find the saved file (named **download_1x1** or something else).

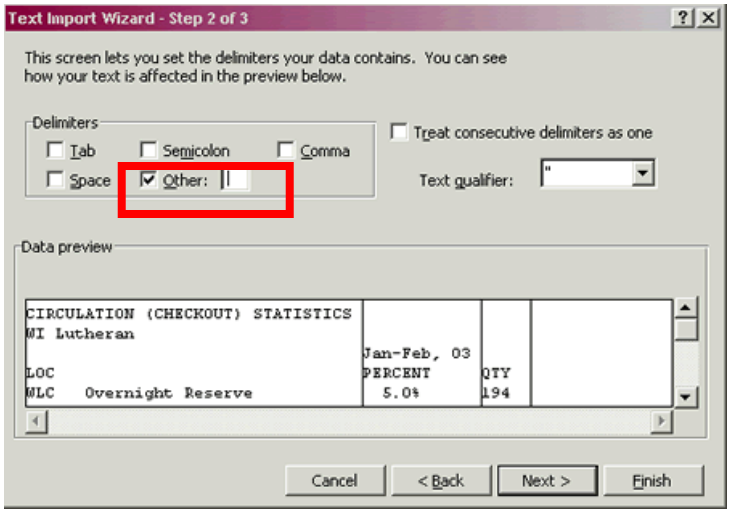
Make sure you are displaying TEXT files since this is the type of file you are downloading. If you don't see this file make sure to change 'Files of Type' to **All Files** or **Text Files** within the Open File dialog box.].




15. Select the file and click **Open**.
16. A **Text Import Wizard** will come up. Use this to import the data in user-delimited file format.
17. Choose the 'Delimited' format and click on the  button.

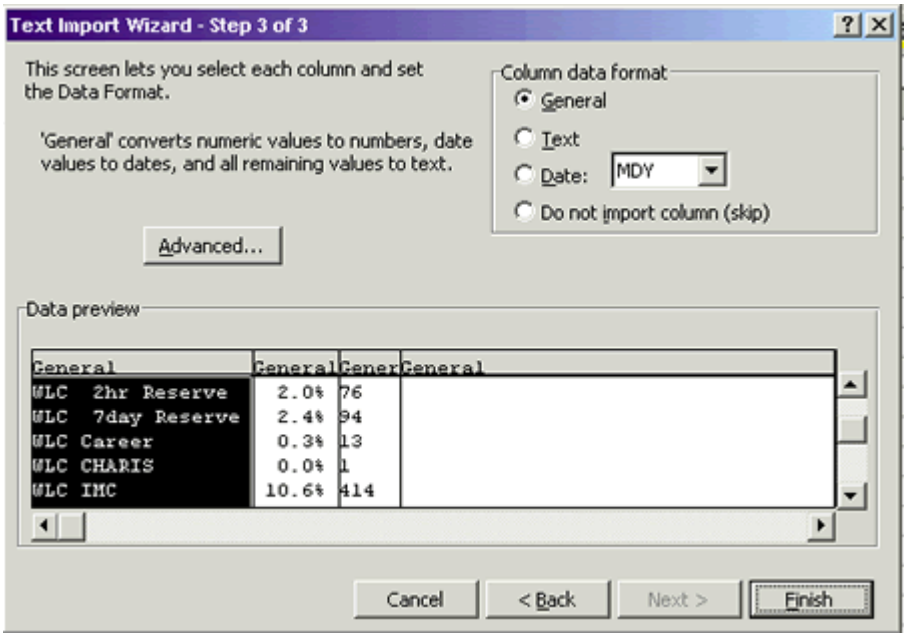

Text Import Wizard - Step 1 of 3
The Text Wizard has determined that your data is Delimited.
choose Next, or choose the data type that best describes your data.
Original data type
Choose the file type that best describes your data:
Delimited
Fixed width
Start import at row:
1
File origin:
Windows (ANSI)
Preview of file C:\Documents and Settings\Jenny Sc...\download_1x1.
1 CIRCULATION (CHECKOUT) STATISTICS|
2 WI Lutheran|
3 |Jan-Feb, 03|
4 LOC|PERCENT|QTY|
5 WLC Overnight Reserve| 5.0%|194|
Cancel
< Back
Next >
Finish

18. Under the 'Delimiters' area, check 'Other' and use the **|** key (pipe or vertical bar) to delimit cells. (Depending on the report, you may need to play around with the other delimiter options). Then click the **Next** button

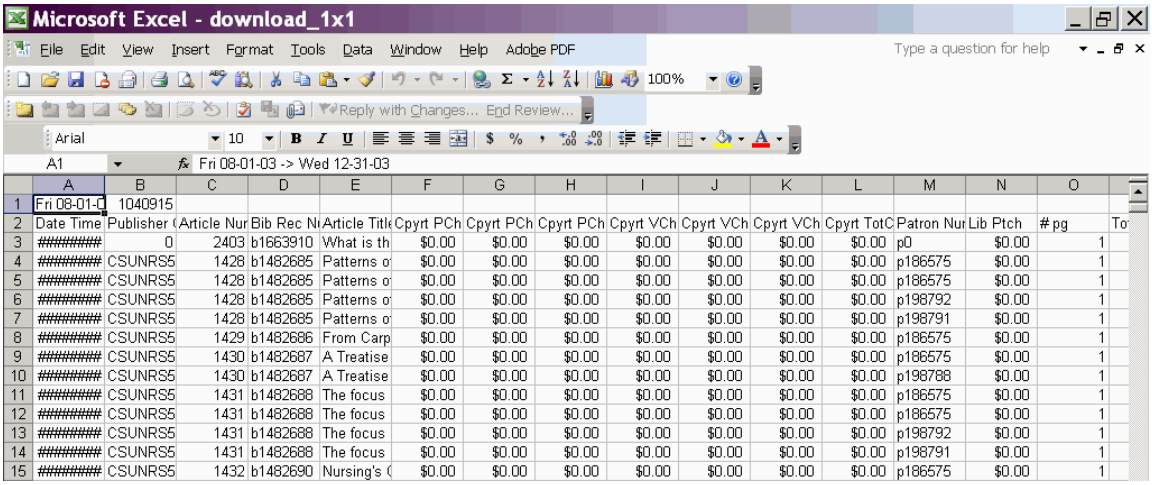



Note: if you cancel out of the Import Wizard, the file will automatically be dumped as is into the opened software program as a new file.

19. The final step of the **Text Import Wizard** allows you to preview the data and set how the date will be displayed. Under 'Advanced' you can control how numeric data will be presented (with commas or decimal points). At this point, simply end by clicking on the **Finish** button.


Text Import Wizard - Step 3 of 3
This screen lets you select each column and set the Data Format.
'General' converts numeric values to numbers, date values to dates, and all remaining values to text.
Column data format
General
Text
Date: MDY
Do not import column (skip)
Advanced...
Data preview
General General General General
WLC 2hr Reserve 2.0% 76
WLC 7day Reserve 2.4% 94
WLC Career 0.3% 13
WLC CHARIS 0.0% 1
WLC IMC 10.6% 414
Cancel
< Back
Next >
Finish

20. The report will now dump into Excel as in the below example:




21. You now need to format and manipulate the data to control the report's appearance. Remember to go to **File | Save As** to save the new document as an Excel spreadsheet, or .xls file.

**IMPT: Whenever you see pound symbols within Excel, ####### as they display above that indicates that there is not enough room in the column to display the data. Drag over the**

22. For other help, see Two Ways to Get Data from WMR into Excel.

# Two Ways to Get Data from WMR into Microsoft Excel

## Copying & Paste Option for Web Management Reports

1. Create a report using Web Management Reports (WMR) http://topcat.switchinc.org/manage/

2. Highlight parts or all of a report. Then copy and paste the data into a new Microsoft Excel document. When first pasting data into the Excel file, be sure your cursor is in the first cell at the top left (A1).

3. If you copied over the entire report and would like to sort by PUBLISHER CODE in order to remove the records from other libraries, select that column:

   a. Go to the top of the Excel worksheet where the columns are lettered and in gray cells.
   b. With the mouse, go to the column you want to highlight and click once on the gray cell
   c. The whole column should now be highlighted.

   Now SORT the column alphabetically by going up on the main menu and selecting Data | Sort.

4. Delete any unneeded columns by highlighting the column and then choosing Edit | Delete from the main menu.

5. Resize columns as needed:

   a. Go to the very top of the Excel sheet where each column is lettered and in gray cells.
   b. Locate the column you want to resize. Hover over the left or right vertical line for that column until the mouse changes to a double-arrow.
   c. Drag to the left and right as needed.

6. Continue to format the report in Excel as needed.

## Download Report into Excel & Use a Macro

1. Create a report using Web Management Reports (WMR) http://topcat.switchinc.org/manage/

2. Use the DOWNLOAD button within WMR to save the report as a text file to your desktop. Feel free to rename the file if you'd like


3. Open MS Excel and choose File | Open from the main menu

4. Open the file you downloaded to the desktop. Make sure the bottom of the Open File dialog box is set so that the "Files of Types" pull down displays "All Files." This insures you can see all text (.txt) files. Locate the file you downloaded to your desktop.

5. Use the Text Import Wizard and the **delimited** format to bring in the text file data. Use the pipe symbol or (|). Then hit "Finish."

6. Once the report data is in Excel, you create a macro to do basic formatting for future reports.

   a. From the main menu, choose Tools | Macros | Record New Macro.
   b. Give the macro a name and store it in "Personal Macro Workbook." Choose a letter for this macro shortcut.
   c. Hit OK to start recording.
   d. Perform those commands you would like to include in the macro. Some suggestions are on the back

7. Hit the **Stop** button to end recording the macro.

Please see this page on the SWITCH Staff Web Site
for more information:
http://caspian.switchinc.org/~tutorials/staff/circres/pubc.html

**A FEW SUGGESTIONS FOR FORMATTING COMMANDS YOU COULD INCLUDE IN A MACRO.**

- Highlight the first row and delete it.
- Sort the Publisher Code column. (This will help you identify records from other libraries that you can remove later). To do this, first select the column (To highlight a column, go to the top of the worksheet where the columns are lettered and in gray cells. Find the column you need and click once on the gray, lettered cell for that column. The column should now be selected.). Afterwards, choose **Data | Sort** to sort the column in ascending or descending order.
- Insert a row at the very top of the sheet. (Click once on Cell 1, then choose Insert | Row from the main menu).
- Merge this first row and insert a report heading. (To merge cells, highlight the row and choose the **Merge** button from the Formatting toolbar. ).
- Delete any unneeded columns To do so, highlight the column and choose **Edit | Delete** from the main menu.
- Insert gridlines into your report. To do so, select all cells (click once on the very top left cell in between cells A and 1). Then pull down the **Borders** button from the Formatting toolbar, and choose all lines, .
- Format all cells so that report data will reside at the top left of each cell. To do so, select all cells, then choose **Format | Cells | Alignment** from the main menu. For the **Horizontal Text Alignment**, choose **Left**; for the **Vertical Text Alignment**, choose **Top**. You may or may not want to wrap text or make other formatting changes here. Then click OK.

Perform any other basic formatting you would like to be applied to future reports.